

<b>EPA</b> United States Environmental Protection Agency Washington, DC 20460 <b>Work Assignment</b>						Work Assignment Number B-01				
						<input type="checkbox"/> Other <input type="checkbox"/> Amendment Number:				
Contract Number EP-C-14-014			Contract Period   07/18/2014   To   02/13/2015 Base <input checked="" type="checkbox"/> Option Period Number			Title of Work Assignment/SF Site Name WaterSense Program Implementat				
Contractor EASTERN RESEARCH GROUP, INC.					Specify Section and paragraph of Contract SOW 3.2					
Purpose: <input checked="" type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Close-Out <input type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Incremental Funding <input type="checkbox"/> Work Plan Approval						Period of Performance  From   08/12/2014   To   02/13/2015				
Comments:										
<div style="display: flex; justify-content: space-between;"> <input type="checkbox"/> Superfund           Accounting and Appropriations Data           <input checked="" type="checkbox"/> Non-Superfund         </div>										
Note: To report additional accounting and appropriations date use EPA Form 1900-69A.										
SFO <input type="checkbox"/> (Max 2)										
Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										
Authorized Work Assignment Ceiling										
Contract Period:		Cost/Fee:				LOE: 0				
07/18/2014 To 02/13/2015										
This Action:						7,070				
Total:						7,070				
Work Plan / Cost Estimate Approvals										
Contractor WP Dated:				Cost/Fee:			LOE:			
Cumulative Approved:				Cost/Fee:			LOE:			
Work Assignment Manager Name   Tara OHare  <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>							Branch/Mail Code: Phone Number   202-564-8836 FAX Number:			
Project Officer Name   Robin Danesi  <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>							Branch/Mail Code: Phone Number: 202-564-1846 FAX Number:			
Other Agency Official Name   Kathleen Rechenberg  <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>							Branch/Mail Code: Phone Number: 513-487-2853 FAX Number:			
Contracting Official Name   Sandra Stargardt-Licis  <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>							Branch/Mail Code: Phone Number: 513-487-2006 FAX Number:			

**PERFORMANCE WORK STATEMENT**  
**Technical Evaluation and Market Assessment Support for the Water Efficiency Program**  
**Contract # EP-C-14-014**  
**Work Assignment No. B-01**

**I. ADMINISTRATIVE (PWS Area 3.2)**

**A. Title: WaterSense® Program Implementation Support**

**B. Work Assignment Contracting Officer Representative:**

Tara O'Hare  
US EPA (MC: 4204M)  
1200 Pennsylvania Ave., N.W.  
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**Alternate Work Assignment Contracting Officer Representative:**

Karen Wirth  
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**C. Quality Assurance:**

The requirements include the collection of secondary environmental measurements in the partner annual reporting process; therefore, a supplemental programmatic quality assurance project plan (PQAPP) is required. The Contractor shall submit a combined PQAPP for both WA B-05 and this work assignment.

**D. Background:** EPA launched WaterSense, a voluntary partnership program to enhance the market for water-efficient products and practices in June 2006. The program seeks to provide information to residential, commercial and industrial consumers to help them select water-efficient products and adopt water-efficient practices; encourage manufacturers and service providers to increase the water-efficiency of their offerings; provide a turn-key approach to promoting water efficiency for local officials and organizations to use in their efforts; and inform the public about the importance of using water resources efficiently.

Recruiting new participants to the voluntary partnership program is critical to the success of the program. There are currently several partner categories: Promotional Partners, Manufacturers, Certified Professionals, Retailers/Distributors, Homebuilders, and Licensed Certification Providers. EPA has invited targeted



partners to join the WaterSense program. Partners have access to routine online webinars and quarterly newsletter. Tools have been developed and are being provided to successfully promote WaterSense. EPA requires support for these WaterSense general program implementation activities. The contractor shall be familiar with EPA's Office of External Affairs and Environmental Education (OEAE) guidelines, standards, best practices, technical requirements for Web site design and publications and all deliverables shall comply with those requirements.

## **II. OBJECTIVE:**

The objective of this work assignment is to provide general program support and partner recruitment for the WaterSense program. This shall include activities to provide administrative support, strategic input, and implementation support, while maintaining regular contact with EPA personnel. In order for the contractor to fulfill the requirements of the tasks specified in this work assignment, it shall require information, reports, analysis, etc from other WAs under this contract; however, no work shall be duplicated on any two WAs. While every effort has been made to anticipate programmatic needs and deliverable timeframes, the contractor may be asked to complete a task assignment within the scope of the task description detailed below on a shorter timeframe than originally anticipated.

## **III. Level of Effort: EPA estimates it will take 7070 hours to complete this work assignment.**

## **IV. TASK DETAIL:**

The contractor shall perform the following tasks:

### **Task 0 - Work Assignment Management**

The contractor shall prepare a detailed work plan and budget for the accomplishment of the indicated tasks in accordance with the clause Work Assignments (EPAAR 1552.211-74). The work plan shall include a description of: (a) proposed staff; (b) an estimate of hours to be spent on each task by each staff person (prime and subcontractors); and (c) a list of deliverables, with due dates and schedule for deliverables. This task also includes monthly progress and financial reports which shall conform to the requirements particularized to the clause, F.3 MONTHLY PROGRESS REPORT (EPAAR 1552.210-72) (JUN 1996). The Contractor shall develop a combined PQAPP for WA B-01 and B-05 because the processes and procedures are applicable to the work under both WAs.

The contractor shall meet with the WACOR and/or the Alternate WACOR either in person or via telephone approximately two (2) hours per month to discuss work assignment issues. The contractor shall provide a status update for tasks via email before each meeting and an update of expenditures. The contractor shall meet with the WACOR on specific issues more frequently as directed by the WACOR for approximately three (3) meetings per month.

## **WaterSense Implementation Support**

WaterSense promises to provide a variety of services to partners and stakeholders in implementation of the program. The contractor shall provide support to these stakeholders and partners by completing the tasks detailed below. A number of program materials, guidelines, documents and other program support tools (e.g. program helpline, customer support database, public website, project site, and program email account watersense@epa.gov) have been created and maintained under contract EP-C-09-008. The contractor will be provided access to all of these items by the EPA WACOR to facilitate their support of the requirements in this work assignment.

### **Task 1 Program Implementation:**

- a. WaterSense Customer Support Database – A customer support database was developed and implemented under the previous Water Efficiency contract EP-C-09-008. The contractor shall maintain this database to track all information in the WaterSense program. This information will include, but is not limited to, stakeholder contact information, communications, documents, materials, product listings, annual reporting information from partners, and other program data. The contractor shall enter and update information in the database after each interaction with a stakeholder or partner. This is anticipated to occur on a daily basis. The contractor shall make changes to the database's infrastructure as required to effectively collect new information as the program evolves. Approximately three (3) changes are anticipated during the base period to accommodate the implementation of new specifications, processes, and partner types.
- b. WaterSense Project Site – A project site was created and maintained under contract EP-C-09-008 to provide centralized storage for all WaterSense program documents and information. The contractor shall maintain and update this project site as program documents are created and updated. Access to this site shall be restricted to only the contractor and the EPA WaterSense team.
- c. Program Documents – The contractor shall maintain and update WaterSense program documents as necessary in response to changes in the program. These documents include, but are not limited to, program guidelines, partnership agreements, and annual reporting forms. Editorial revisions to approximately sixteen (16) documents and the creation of approximately three (3) new documents are anticipated during the work assignment period of performance. Changes to document layouts and formats are anticipated to be minor to accommodate editorial revisions to existing documents. All final program documents shall be uploaded to the WaterSense website and the WaterSense project site.
- d. Preparation of Program Materials - EPA requires support in preparing program materials (e.g., graphics, briefing slides, talking points, fact sheets) for use within and outside the Agency. The contractor shall support in the development of briefings, presentations, and other program materials in consultation with EPA personnel. Support for approximately three (3) to five (5) briefings, fact sheets, or other presentations are anticipated over the course of

the work assignment period of performance. Final materials shall be uploaded to the WaterSense website, partner site, or distributed to stakeholders via email as directed by the WACOR via Technical Direction.

- e. Printed Material Management – The contractor shall maintain an inventory of all WaterSense printed materials (e.g. factsheets, brochures, giveaways, etc.) and inform the WACOR and appropriate EPA WaterSense team staff when materials should be reordered. The contractor shall prepare printing packages as necessary for the Government Printing Office and the EPA Print Shop. The contractor shall distribute materials to EPA regional offices and stakeholders when requested by the EPA WACOR via Technical Direction.
- f. Conference planning – The contractor shall maintain a list of upcoming conferences relating to the WaterSense program. The EPA WACOR will inform the contractor on which conferences that the WaterSense booth, pull-up banners, and necessary outreach materials shall need to be sent. The contractor shall work with conference organizers to prepare and ship the WaterSense booth and/or pull-up banners with the necessary outreach materials such as factsheets, brochures, and other giveaways. The contractor may be asked to staff the booth at conferences on behalf of the program and the contractor shall clearly identify her/himself as representing her/his own firm under contract to EPA. For planning purposes, the booth shall be sent and staffed by approximately one contractor personnel for approximately one (1) to two (2) conferences during the period of performance. Anticipated conferences include the WaterSmart Innovations Conference held in Las Vegas on October 8-10<sup>th</sup>. The EPA WACOR will notify the contractor through written technical direction of final details of each conference in advance. All contractor travel, booth logistics, and contractor time to staff the booth will be covered under this WA. The contractor shall complete a trip summary with contacts identified and information gathered at the event. The contractor shall also secure exhibitor space and manage booth logistics in advance of the RESNET Conference in San Diego, CA on February 14 – 18<sup>th</sup>, 2015 and American Water Works Association's Annual Conference in Anaheim, CA on June 7-10<sup>th</sup>, 2015.

If required, the contractor shall secure meeting space for WaterSense related informal meetings as directed by the WACOR. Informal meetings for WaterSense partners and other interested stakeholders will be held in conjunction with other conferences such as the WaterSmart Innovations Conference. Meeting space shall include, but is not limited to, the rental of a room, audio-visual equipment, and sound equipment. The contractor's attendance at the meetings will be directed under other tasks in this work assignment.

- 1. Conference related purchases are not expected to exceed \$20,000 under this contract. OWM will provide an executed EPA Form 5170 in accordance with EPA's Guidelines on Conference Spending Guidelines (6/27/14). All additional costs must be approved by the Contracting Officer before they are incurred.
- g. WaterSense Brand Monitoring – The contractor shall conduct an internet search on a monthly basis to ensure that the WaterSense logo and program marks are being used correctly. The search shall last for approximately thirty (30) hours per month. The contractor shall notify parties in violation of WaterSense logo and label use guidelines via email or telephone with instructions to correct the problem. The contractor shall work with

the party in violation to answer their questions and review revised materials to see if a violation still exists or refer the violation to the Licensed Certifying Body for resolution. If a violator has not corrected the issue within thirty (30) days, the contractor shall contact the organization again with a second notice in writing in accordance with the procedure in the WaterSense Program Guidelines. If resolution is not forthcoming thirty (30) days after the second notice, the contractor shall notify the WACOR for further action.

- h. Web Content – Throughout the work assignment period of performance, the contractor shall develop topical content to support program implementation for the WaterSense website as directed by the WACOR via Technical Direction. The content is anticipated to consist of updates of current text and/or images on approximately fifteen (15) pages and the creation of approximately three (3) entirely new pages during the base period. A separate work assignment will focus on the management and maintenance of the website itself, but specific, topical content shall be created under this Work Assignment. All web content shall comply with section 508 and other Office of External Affairs and Environmental Education (OEAAE) guidelines. In addition to developing and revising web content, the contractor shall maintain the registration of all WaterSense related web domains (approx. 10-15 URLs) that were purchased on EPA's behalf under EP-C-09-008.
- i. EPA Regional Support – The contractor shall provide support to EPA Headquarters and regional staff as they implement the WaterSense program. The contractor shall specifically provide Headquarters with technical and administrative support for bi-monthly calls with the regions. Approximately three (3) calls will be held during the work assignment period of performance, each lasting 1.5 hours at the most. The contractor shall provide support to the EPA WaterSense team to update a presentation for use during these calls. EPA will be facilitating each call. The contractor shall take notes during the calls and provide EPA with a summary in writing to the WACOR within two (2) weeks of each call. The contractor shall also track the number of partners recruited by each region and provide updates on potential organizations to the regions monthly via email. The contractor shall also support EPA regional staff as they implement the WaterSense program. Supporting activities shall include, but are not limited to, responding to regional staff questions within three (3) business days, developing PowerPoint presentations for staff to use, creating and reviewing region-specific outreach and technical materials, and distributing printed materials for regional outreach.

## **Task 2 WaterSense Helpline:**

Under contract EP-C-09-008, a toll-free helpline and email account were established to answer stakeholder questions about the WaterSense program. Callers to the helpline are directed to a WaterSense voice mail box. The contractor shall have access to the helpline and email account during the period of performance of this WA.

- a. Inquiry Response - The contractor shall check the voice mail and email boxes twice per day and respond to information requests within one (1) business day. All calls and emails of a policy nature, and inquiries from media contacts, shall be referred to the WACOR for EPA response. Calls and emails will relate to both programmatic and technical issues. When

responding to calls, the contractor shall clearly identify her/himself as representing her/his own firm under contract to EPA. The contractor shall also update all correspondence, including caller name, organization, contact information, nature of the request, and response, into the WaterSense customer support database.

- b. Helpline Reports - The contractor shall provide a weekly report on relevant helpline activities to the EPA WACOR and WaterSense Team. The report shall be in MS Word format provided via email. The report shall include weekly helpline information such as partnership agreements submitted, the number of labeled products, upcoming emails and webinars, and incoming event requests. Approximately twenty-four (24) reports will be expected during the period of performance of this work assignment. The reports are not expected to exceed 5-6 pages in length.

In addition to weekly reports, the contractor shall provide quarterly helpline updates to the EPA WACOR and WaterSense Team via the meetings referenced in Task 0 that summarize helpline activities and problems addressed. The contractor shall continue to use the same quarterly helpline report format developed under previous contract EP-C-09-008 WA 5-01. Two (2) reports will be required during the work assignment period of performance.

- c. Helpline Maintenance and Procedures - Maintenance and management of the WaterSense helpline is also required. Types of activities shall include: efficiency improvement assessments, redundancy reduction analyses, and updates to Standard Operating Procedures (SOPs.). The contractor is expected to generally assess the established helpline processes to assure WaterSense practices are both efficient and customer-friendly as possible. As possible efficiencies are found, the contractor shall prepare a summary of suggested improvement options for WACOR consideration. The contractor shall execute changes within two (2) weeks of WACOR approval.

When changes are made, the contractor shall provide EPA with updated process and procedure documents for all helpline and partner support tasks affected. These procedures and processes may include, but are not limited to, standard operating procedures for management of data and information, training materials used to teach new helpline staff, and other information used to manage the implementation of the program on a day-to-day basis.

### **Task 3 Partner Support:**

- a. Partnership Agreements and Product Notification Templates – The contractor shall process all partnership agreements and product notification templates received through the helpline and from EPA. The contractor shall also assist EPA and partners, as needed, in completing the appropriate partnership agreements and other necessary forms (e.g., answering questions, obtaining signatures, and distributing executed copies of agreements). The contractor shall work with the Licensed Certifying Bodies, partners, and other organizations to verify information as necessary. All organizational information, forms, documents, and checklists shall be entered and uploaded into the WaterSense customer support database. The contractor shall distribute WaterSense program information to all new partners as appropriate. The contractor shall notify organizations ineligible for partnership within one

(1) week of receipt of partnership agreement. The contractor shall notify the WACOR via email or telephone of any unusual situations or partnership requests within two (2) business days for resolution and shall notify the organization of the WACOR's acceptance or ineligibility determination within one (1) week of WACOR decision. The contractor shall maintain and update a list of current WaterSense partners on the website approximately two (2) times per month. The updates shall coincide with the web updates which will be scheduled under the web support work assignment.

- b. Welcoming New Partners - The contractor shall also support implementation efforts of partners joining the program. This support includes welcoming partners to the program (via telephone or email, as directed by the WACOR), answering questions about participation, and checking in on implementation progress.
- c. Information Distribution to Partners – The contractor shall distribute program information to partners in electronic format approximately one to three times per week using a mass email delivery system. Additional distributions may be required to keep partners updated on the program's progress. Information updates shall include but are not limited to product specification updates, annual reporting and awards information, conference information, and other program updates. All communications shall be recorded in the WaterSense customer support database.
- d. Partner Forum - The contractor shall develop and conduct two specific, topical presentations to assist WaterSense partners in implementing the program. The presentations shall be approximately 1 to 1.5 hours in length and will be web-based. The contractor shall set up the logistics for each call using web-based conferencing software and insure that participants receive all logistical information. The content for the presentations shall be developed in conjunction with activities in other work assignments. All presentation slides shall include speaker notes. The contractor shall take notes during the forum and provide a meeting summary and audio recording to the EPA WACOR within one month of the forum. Two forums shall occur during the period of performance. For planning purposes, the number of presenters will vary depending on the topic with presenters being from partner organizations, EPA staff and contractor personnel. It is estimated that at a minimum (1) one presenter shall be provided for each forum.
- e. Partner Pipeline – The contractor shall develop and distribute a quarterly newsletter, "The Partner Pipeline," for program partners in electronic format. The content shall be developed in conjunction with the EPA WaterSense team. The content of the newsletter will include profiles of partners, marketing information, and other topics used to help partners implement the program. Each issue will be approximately 3-5 pages in length and will be posted electronically on the WaterSense Partner web site. Two (2) issues of the Pipeline shall be developed during the period of performance of this WA.

**Task 4. Program Evaluation and Analysis:** Under contract EP-C-09-008, the WaterSense team developed a set of measures for evaluating program success.



- a. Partner Activity Information and Case Studies - EPA anticipates that the primary metrics will be output measures (e.g., number of partners, number of products labeled). To augment these data, the contractor shall collect anecdotal information, partner quotes, and data on program success on particular projects and initiatives. A mechanism for collecting partner activity information was created under WA 1-01 of contract EP-C-09-008 and has been maintained on the WaterSense Partner web site. The contractor shall record all partner activity information using this mechanism and/or the WaterSense customer support database as appropriate.
- b. Annual and Quarterly Data Collection - The contractor shall collect and compile annual data from all WaterSense partners and quarterly data from Licensed Certification Provider partners. All data marked confidential shall be treated as such under Confidential Business Information procedures. The annual data collection process for calendar year 2014 will begin on or around January 5, 2015 and will continue into the Option Period 1 of this contract. The aggregated data shall be submitted to EPA for review after a quality review has been conducted as detailed in the approved PQAPP on or before April 15, 2015 (future WA 1-01). If requested by the WACOR, the contractor shall provide additional updated documentation of the procedures used to collect, process, QA/QC, and aggregate all data collected before it is delivered to EPA. Half of an annual data collection cycle and two (2) quarterly data collections are anticipated during the period of performance of this WA. If requested by the WACOR, the contractor shall provide a preliminary status update of the annual reporting process at the end of this WA.
- c. Internal Accomplishments Report - The contractor shall develop an internal program accomplishments report for the activities occurring in calendar year 2014. The report shall include helpline, website, and other program statistics and information relevant to the administration of the program. The format and content required for this internal report will be similar to the one developed for calendar year 2013 under WA 5-01, EP-C-09-008. No publishing or layout design will be required for this internal report.

**Task 5. Strategic Planning Support:** As WaterSense moves forward, it will be important to keep abreast of changing conditions in the marketplace to identify areas for new initiatives and to revise on-going activities.

- a. The contractor shall contribute to EPA's development of the strategic direction of the program including providing necessary analysis and suggested approaches as the program is developed. Previous examples of this type of work include targeted recruiting strategies and the development of the WaterSense State Challenge and the WaterSense H2Otel Challenge. Similar but not identical efforts will be required during the period of performance. This could include participating in strategic meetings, delivering analysis on certain products and/or market sectors, etc. Approximately two (2) strategy related meetings are anticipated during the work assignment period of performance for a length of approximately two (2) hours each.
- b. The contractor shall keep abreast of changing conditions in the marketplace that may affect EPA's program approach or on-going activities, or that may present opportunities for new

initiatives, and inform EPA of relevant changes and potential opportunities in summary format as appropriate.

**Task 6. Partner Recruitment and Engagement.** Recruitment and engagement of partners is a critical aspect of the WaterSense program. In order to transform the market for water-efficient products and services, WaterSense must work closely with different partner types to promote the products constructed by manufacturers and sold by retailers, as well as promote water-efficient practices and professionals. This work includes a combination of recruiting new partners, engaging existing partners under targeted campaigns, and collaborating with other external stakeholders that are not currently eligible for WaterSense partnership. An example of a targeted campaign is the WaterSense H2Otel Challenge started under EP-C-09-008 where new partners are being recruited and existing partners are conducting outreach and promotion to hotel facilities and other stakeholders. The Contractor shall provide support for partner recruiting and the engagement of existing partners and stakeholders throughout the period of performance of this work assignment including completion of the 2014 WaterSense H2Otel Challenge and the launch of a similar targeted campaign for 2015. Tasks in this WA shall not duplicate those of other WAs. For example, technical and outreach support for the WaterSense H2Otel Challenge will be conducted under WA B-05, but tasks in this WA will likely include activities to recruit new promotional partners and support existing partners and stakeholders as they try to reach the hotels.

Recruitment and engagement activities shall include the following tasks:

- a. The contractor shall continue to implement and update recruiting and engagement strategies and targeted campaign support initiated under EP-C-09-008 WA 1-01 through 5-01. Activities shall include directional development of the recruiting strategy based on previous WaterSense research and partner experiences, reprioritization (as applicable), execution of recommended strategies, and reiteration through program growth. Partner recruitment and engagement strategies are to be based upon market research and technical support conducted under other ongoing WaterSense Work Assignments and shall be updated as market conditions change and more information is available on the effectiveness of our efforts.

Examples of recruitment and engagement activities may include, but are not limited to:

- Identification of appropriate potential partners, and assist in prioritizing potential partners for targeting, in these industries and sectors: utility, trade associations, nonprofits, state/local government agencies, water-related service providers, plumbing, manufacturing, irrigation, and distribution/retail.
- Developing and disseminating relevant recruitment materials, such as mass emails, email templates, direct mailings, or other helpful information to targeted potential partners;
- Attending appropriate conferences/trade shows (e.g. presenting the business case to potential promotional partners);
- Composing written recruiting reports, web pages, handouts, etc.;
- Developing incentives such as special recognition ceremonies to recognize new partners;



- Creating case studies of current partners highlighting partnership benefits to potential partners;
  - Compiling a business case for joining WaterSense, specific to plumbing manufacturers, retailers, and irrigation product manufacturers and service professionals; including the benefits to each type of partner of joining WaterSense and key messages for partnership promotion; and
  - Conducting other methods deemed appropriate for reaching and persuading target audiences.
- b. The contractor shall track interest in the program through the customer support database and follow up with ‘hot’ prospects on an ongoing basis to convince them to join the program. The contractor shall alert EPA to opportunities with stakeholders who appear to be highly motivated and capable of superb results for extra emphasis in the recruitment process. The contractor shall also support the implementation of targeted campaigns for priority audience groups, which is also described in the recruitment strategy documents developed under previous work assignments. For example, the contractor may need to recruit several utilities from a certain size or in a targeted region to participate in WaterSense and deliver coordinated water-efficiency messages to local residents. In addition, the contractor shall follow-up with contacts made during a conference, meeting, or webinar using the established SOPs used by the WaterSense helpline.
- c. WaterSense Webinars – The contractor shall provide support to the WaterSense program automating WaterSense webinars for particular organizations. Approximately three (3) one-hour webinars are anticipated during the period of performance of this WA. The contractor shall work with the WACOR to automate the webinars via podcast or web technology on the WaterSense website as approved by the WACOR. These webinars may include information to introduce potential partners and stakeholders to the WaterSense program and welcome new partners.

## V. DELIVERABLE SCHEDULE:

Task		Deliverable	Due Date
<b>Task 0</b>		Work plan	15 business days after the contractor receives the work assignment
		PQAPP	15 business days after receipt of work assignment (WA)
		Task status update (via email)	Monthly
		Expenditure update by task code	Monthly
<b>Task 1</b>	a.	Database modifications	Within two (2) weeks of receipt of Database Modification details from EPA WACOR
	b.	Updated project site	Within one (1) week of finalized item

		Final versions of all documents and data housed on the project site	Within three (3) weeks of receipt of details from the WACOR
	c.	Draft program documents	Within three (3) weeks of receipt of program document details from the EPA WACOR
		Final program documents	Within two (2) weeks of receipt of EPA comments
	d.	Draft program materials	Within three (3) weeks of receipt of program material details from the WACOR
		Final program materials	Within two (2) weeks of receipt of EPA comments
	e.	Updated materials inventory	Within one (1) week of receipt of details from the WACOR
		Printing package	Within one (1) week of receipt of details from the WACOR
	f.	Trip summary	Within two (2) weeks of returning from trip
	g.	Updated brand monitoring records in database	Within one (1) week of violation discovery or stakeholder contact
	h.	Draft web content	Within two (2) weeks of receipt of web content details from the WACOR
		Final web content	Within two (2) weeks of receipt of EPA comments
		Records of and access to all web domains procured or renewed under the contract	Within two (2) weeks of receipt of details from the WACOR
	i.	Updated presentation for regional call	Within one (1) week of receipt of details from the WACOR
		Regional call summary	Within two (2) weeks of regional call
		Regional recruiting and partner update	Monthly
		Updated database records for regional requests	Within one (1) week of regional interaction
		Draft regional material	Within two (2) weeks of receipt of details from the WACOR
		Final regional material	Within two (2) weeks of receipt of EPA comments
<b>Task 2</b>	a.	Updated database records	Within one (1) week of stakeholder interaction
	b.	Weekly helpline report	Weekly
		Draft quarterly helpline report	On or around Sept 1, 2014 and February 1, 2015
		Final quarterly helpline report	Within two (2) weeks of receipt of EPA comments
	c.	Draft updated SOPs	Within two (2) weeks of receipt of SOPs details from the WACOR

		Final updated SOPs, training materials, and other procedural documents	Within three (3) weeks of receipt of EPA comments
		Summary of process improvement options and changes	Within three (3) weeks of receipt of details from WACOR
		Execution of changes	Within two (2) weeks of WACOR approval
<b>Task 3</b>	a.	Updated database records	Within one (1) week of stakeholder interaction
		Uploaded partnership agreements and product notification templates	Within one week of receipt of partnership agreement and within two weeks of receipt of product notification template
		Problem notification to WACOR	Within two business days
		Updated partnership listing on website	Twice monthly
	b.	Draft or updated partner welcome materials	Within two weeks of receipt of details from the WACOR
		Final partner welcome materials	Within one week of receipt of comments from the WACOR
	c.	Draft partner communication content	Within one week of receipt of details from the WACOR
		Final partner communication content	Within one (1) week of receipt of comments from the WACOR
	d.	Draft forum presentation	Within two (2) weeks of receipt of details from the WACOR
		Final forum presentation	Within one (1) week of receipt of comments from WACOR
		Forum meeting summary and audio recording file	Within one (1) month of meeting
	e.	Outline of partner pipeline	Within two (2) weeks of receipt of details from the WACOR
		Draft partner pipeline	Within three (3) weeks of receipt of details from the WACOR
		Final partner pipeline	Within two(2) weeks of receipt of EPA comments
<b>Task 4</b>	a.	Updated partner activity data or information in database	Within three (3)weeks of receipt of details from the WACOR
		Draft case study or partner activity summary	Within three (3) weeks of receipt of details from the WACOR
		Final case study or partner activity summary	Within two (2)weeks of receipt of EPA comments
	b.	Uploaded annual and quarterly reporting data and form from partners	Within one (1) week of receipt of data or form
		Preliminary status update of annual reporting process	On or before February 13, 2015.

		Updated process and procedural documents	Within three (3) weeks of receipt of details from the WACOR
		Quarterly reporting summary	On or around October 1, 2014 and Feb. 13, 2015
		Evaluation and suggested revisions of annual and quarterly data collection and analysis	Within three (3) weeks of receipt of details from WACOR
	c.	Draft content for internal accomplishments report	Within one (1) month of receipt of details from the WACOR
		Final content for internal accomplishments report	Within three weeks of receipt of EPA comments
<b>Task 5</b>	a.	Participation in strategy meetings	As directed by WACOR
		Summary/analysis of strategy meetings	Within three (3) weeks of receipt of details from the WACOR
		Market research summary	Within one (1) month of receipt of details from the WACOR
<b>Task 6</b>	a	Updated recruiting or engagement strategy	Within three (3) weeks of receipt of details from the WACOR
		Draft recruiting or engagement material	Within one (1) month of receipt of details from the WACOR
		Final recruiting or engagement material	Within two (2) weeks of receipt of comments from WACOR
		Draft call invite and/or newsletter piece	Within two (2) weeks prior to call
		Final call invite and/or newsletter piece	Within two (2) days of receipt of comments from WACOR
		Updated recruiting or engagement presentation	Within three (3) days prior to call
		Completed follow up with webinar, meeting, or conference participants	Within five (5) business days of interaction
	b.	Updated lead records in database	Within one (1) week of stakeholder interaction
		Completed follow up with webinar, meeting, or conference participants	Within five (5) business days of interaction
	c.	Draft webinar presentation	Within two (2) weeks of receipt of details from the WACOR
		Final webinar presentation	Within two (2) weeks of receipt of comments from WACOR
		Final recorded webinar files	Within three (3) weeks of presentation recording

Documents prepared under this contract shall be provided in electronic format, compatible with the MS Office Suite. The contractor shall be familiar with EPA's Office of External Affairs and Environmental Education (OEAAE) guidelines, standards, best practices, technical requirements for web site design and publications and all deliverables shall comply with those requirements. All documents shall be provided first as drafts. EPA may provide comments for the contractor to incorporate into the final documents. The final document format will be agreed upon by the EPA WACOR and the contractor in advance. The contractor shall also provide electronic copies of any data files developed in the course of this Work Assignment.

The contractor shall discuss any disagreements with or questions on EPA-provided comments prior to submission of a final document. All deliverable revisions will be due back to the EPA WACOR no later than 15 business days after the contractor receives EPA feedback unless otherwise specified by the WACOR. If EPA chooses not to provide comments, the draft document will be accepted as final, and the contractor will be notified that no revisions are required.

## **VI. MISCELLANEOUS**

### **A. Software Applications and Accessibility.**

Word processing files delivered to the Government shall be Microsoft Word, 8.0 or higher. All software and electronic information technology shall conform to the requirements relating to accessibility as detailed to the 1998 amendments to the Rehabilitation Act, particularly, but not limited to, § 1194.21 Software applications and operating systems and § 1194.22 Web-based intranet and internet information and applications. See: <http://www.section508.gov>.

- Preferred text format: MS Word, 8.0 or higher (MS Office 2007 or higher)
- Preferred presentation format: Power Point, Office 2007 or higher
- Preferred graphics format: Each graphic is an individual GIF file
- Preferred portable format: Adobe Acrobat, Version 6.0

### **B. Travel.**

Travel is expected for this work assignment. Any travel chargeable to this work assignment shall be allowable only in accordance with the limitation of FAR 31.205-43 and FAR 31.205-46, and must be approved by the EPA Contracting Officer Representative (COR) prior to travel taking place. For planning purposes, the contractor shall assume 1 to 2, 3-4 day trips will be required over the course of this Work Assignment.

### **C. Release of Data and Information.**

All information collected and developed under this Agreement is the property of the U.S. EPA and shall not be released to the public or used for other work or projects, including EPA or other federal work, without written authorization of the Contracting Officer.

### **D. Conference/Meeting Guidelines and Limitations:**

All appropriate clearances and approvals required by Agency policy in support of any and all conference related activities and expenses, including support of meetings, conferences, training events, award ceremonies and receptions, including the form 5170 for all meetings costing more than \$20,000, shall be obtained by the EPA Contract Level COR as needed and provided to the Contracting Officer (CO). Work under conference related activities and expenses shall not occur until this approval is obtained and provided by the EPA Contract Level COR.

Conference expenses are all direct and indirect costs paid by the government and include any associated authorized travel and per diem expenses, room charges for official business, audiovisual use, light refreshments, registration fees, ground transportation and other expenses as defined by the Federal Travel Regulations. All outlays for conference preparation should be included, but the federal employee time for conference preparation should not be included. After notifying EPA of the potential to reach this threshold, the Contractor shall not proceed with the task(s) until authorized to do so by the Contracting Officer.

#### **E. Contractor identification**

Contractor personnel shall always identify themselves as Contractor employees by name and organization and physically display that information through an identification badge. Contractor personnel are prohibited from acting as the Agency's official representative.

The Contractor shall refer any questions relating to the interpretation of EPA policy, guidance, or regulation to the Work Assignment Contracting Officer Representative.

#### **F. Technical Direction**

The Contract level COR or an authorized individual is permitted to provide technical direction. Technical direction must be within the statement of work of the contract and includes: (1) Direction to the contractor which assists the contractor in accomplishing the Statement of Work, (2) Comments on and approval of reports or other deliverables. Technical direction will be issued in writing or confirmed in writing within five (5) calendar days after verbal issuance. One copy of the technical direction memorandum will be forwarded to the Contracting Officer and the Contract Level Contracting Officer Representative.

#### **G. Management Controls**

All printing shall be in accordance with clause H.2 (Printing) of the contract.

## VII. QUALITY ASSURANCE SURVEILLANCE PLAN

All tasks are to be completed on or ahead of schedule unless EPA and the contractor mutually agree to a schedule change.

A Quality Assurance Project Plan will be required for this Work Assignment since secondary data will be collected in partner annual reporting.

Quality Assurance Surveillance Plan			
General Management and Administration			
Performance Requirement	Measurable Standards	Surveillance Methods	Incentives/ Disincentives
<b>Management and Communications:</b> During the performance of the Contract, the Contractor shall immediately inform EPA of any issue that may potentially impact project schedules or cost.	The contractor shall maintain contact with contract managers (EPA CO, PO and WACOR) throughout the performance of the contract and identify any issues or concerns to the appropriate EPA contract manager prior to occurrence. In cases where issues have a direct impact on project schedules and cost, the contractor shall provide options for EPA's consideration on resolving or mitigating the impacts.	EPA contract managers will allocate the time needed to discuss and address all issues identified by the Contractor. Each EPA contract manager will document and maintain a complete record of the issues, agreements and outcome. All EPA contract managers will review monthly progress reports for indicators of communications problems and will bring issues to the Contractor's immediate attention.	Any issues that impact project schedules and cost that are not brought to the attention of the appropriate EPA contract manager before occurrence will be unsatisfactory. Two or more incidents during any contract option period will be reported as unsatisfactory performance in the CPARS Performance Evaluation System. Costs associated with schedule delays or performance due to late delivery attributed to the contractor shall be assumed by the contractor and shall not result in additional expense to the government.
<b>Timeliness:</b> The Contractor shall provide services and submit deliverables in accordance with the approved work assignment schedule.	Services and deliverables shall be in accordance with schedules outlined in section V in this PWS unless modified by technical direction from the WACOR. Unless amended or modified by an approved EPA action, a deliverable that is received 7-days past the due date, will be considered unsatisfactory performance.	EPA will closely monitor task milestone and deliverable schedules and shall notify the contractor when it becomes apparent that an established schedule will not be met. EPA will review the Contractor's Monthly Progress Reports and any special reporting	An annual on time performance standard of less than 90% will be unsatisfactory performance and will be reported in the CPARS Performance Evaluation System. Costs associated with schedule delays or performance due to

		requirements to compare actual delivery dates against those included in Section V of this PWS.	late delivery attributed to the contractor shall be assumed by the contractor and shall not result in additional expense to the government.
<b>Cost Management and Control:</b> The Contractor shall perform all work in an efficient and cost effective manner, applying cost control measures where practical.	<p>The Contractor shall monitor, track and accurately report level of effort, labor costs, other direct costs and fee expenditures to EPA through monthly progress reports and approved special reporting requirements.</p> <p>The Contractor shall assign appropriately leveled and skilled personnel to all tasks, practice and encourage time management, and ensure accurate and appropriate time keeping.</p>	<p>The EPA Project Officer will routinely meet with the Contractor's Project Manager to discuss the work progress and expenditures of this WA. The Project Officer shall review the Contractor's monthly progress reports and request the Work Assignment Managers verification of expenditures and technical progress before authorizing invoice payments.</p> <p>The EPA Work Assignment Manager will maintain regular contact with the Contractor's designated work assignment manager/project manager to discuss work assignment progress and expenditures. The Work Assignment Manager will review the Contractor's monthly progress reports and invoices and provide feedback to the Project Officer on payment.</p>	An overrun that exceeds 3% of the total contract obligation that is the direct result of the Contractor's failure to manage and control costs will result in unsatisfactory rating being reported to the CPARS Performance Evaluation System and shall not result in additional expense to the government..
<b>Quality of Deliverables:</b> Technical: The Contractor shall collect and analyze data in support of the Agency's decision-making. Editorial: The Contractor shall ensure editorial quality of all deliverables.	The analysis conducted by the Contractor shall be factual and defensible and based on sound science and engineering. All data shall be collected from reputable sources and quality assurance measures shall be conducted in accordance with Agency requirements and the specific requirements included in section 2.5 of the QAPP for this WA. Any work requiring the Contractor to provide	The appropriate Contract Managers will review all deliverables including analysis conducted by the Contractor and will independently consider their merit. EPA may opt to peer review analyses to further validate merit.	All analyses conducted for EPA by the Contractor must be factual and based on sound science and engineering. All editorial content in final deliverables (excluding technical documents) must conform to the AP Styleguide unless otherwise specified by EPA Contract Manager.



	<p>options or recommendations shall include the rationale used in selecting the option/recommendation and all other options considered. The Contractor's deliverables or written submissions shall be clear and concise and error free while conforming to the AP and WaterSense Style guides.</p>		<p>If after reviewing the Contractor's final deliverable, EPA determines that the content is not factual, legally defensible or based on sound science and engineering, or contains editorial errors, the Contractor will be expected to redo the work at no cost to the government and the Contractor's performance will be reported as unsatisfactory in the CPARS Performance Evaluation System.</p>
<p><b>Socio-Economic Utilization:</b> The Contractor shall ensure maximum practicable participation by socio-economic firms.</p>	<p>The Contractor shall assess all Agency requirements for opportunities to fully utilize expertise of its socio-economic team. Work shall be allocated in a manner that ensures the Contractor's annual subcontracting goals are met.</p>	<p>EPA will monitor the contractor's utilization of socio-economic firms by reviewing the Contractor's submittal of Standard Forms (SF) 294 and SF 295.</p>	<p>The Contractor shall meet a standard of at least 80% of the dollar goals outlined in its subcontracting plan annually. If less than 80% is reached, the Contractor shall provide a detailed explanation and shall outline the steps that will be taken to meet the annual goals outlined in its plan. Performance that does not meet the stated goals without sufficient justification will be reported as unsatisfactory in the CPARS Performance Evaluation System.</p>

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<p>Project Officer Name   Robin Danesi</p> <div style="display: flex; justify-content: space-between; margin-top: 20px;"> <div> <p>_____</p> <p style="text-align: center; font-size: x-small;">(Signature)</p> </div> <div> <p>_____</p> <p style="text-align: center; font-size: x-small;">(Date)</p> </div> </div>		<p>Branch/Mail Code:</p> <p>Phone Number: 202-564-1846</p> <p>FAX Number:</p>																																																																		
<p>Other Agency Official Name   Kathleen Rechenberg</p> <div style="display: flex; justify-content: space-between; margin-top: 20px;"> <div> <p>_____</p> <p style="text-align: center; font-size: x-small;">(Signature)</p> </div> <div> <p>_____</p> <p style="text-align: center; font-size: x-small;">(Date)</p> </div> </div>		<p>Branch/Mail Code:</p> <p>Phone Number: 513-487-2853</p> <p>FAX Number:</p>																																																																		
<p>Contracting Official Name   Sandra Stargardt-Licis</p> <div style="display: flex; justify-content: space-between; margin-top: 20px;"> <div> <p>_____</p> <p style="text-align: center; font-size: x-small;">(Signature)</p> </div> <div> <p>_____</p> <p style="text-align: center; font-size: x-small;">(Date)</p> </div> </div>		<p>Branch/Mail Code:</p> <p>Phone Number: 513-487-2006</p> <p>FAX Number:</p>																																																																		

**PERFORMANCE WORK STATEMENT**  
**TECHNICAL EVALUATION AND MARKET ASSESSMENT SUPPORT FOR THE WATER EFFICIENCY**  
**PROGRAM**  
**(Contract # EP-C-14-014)**  
**Work Assignment No. B-02**

**I. ADMINISTRATIVE (PWS Area 3.3),**

**A. Title:** WaterSense Consumer Marketing and Partner Recognition

**B. Period of Performance:** Issuance through February 13, 2015

**C. Work Assignment Contracting Officer Representative (WACOR):**

Karen Wirth  
US EPA  
1200 Pennsylvania Ave., NW  
Washington, DC 20460  
[Wirth.karen@epa.gov](mailto:Wirth.karen@epa.gov)  
202-564-5246 (phone)  
202-501-2396 (fax)

**Alternate WACOR:**

Alicia Marrs  
US EPA  
1595 Wynkoop St  
Denver, CO 80202  
[marrs.alicia@epa.gov](mailto:marrs.alicia@epa.gov)  
303-312-6269 (Phone)  
1-(877) 876-9101 (Fax)

**D. Quality Assurance:**

This work assignment does not involve the collection of environmental measurement; therefore, a supplemental programmatic quality assurance project plan (PQAPP) is not required.

**E. Background:** WaterSense is a voluntary partnership program to enhance the market for water-efficient products and practices. The program provides information to residential, commercial and industrial consumers to help them select water-efficient products and adopt water-efficient practices; encourage manufacturers and service providers to increase the water-efficiency of their offerings; provide a turn-key approach to promoting water efficiency for local officials and organizations to use in their efforts; and inform the public about the importance of using water resources efficiently.

EPA is seeking contract assistance to provide ongoing communications and outreach support, as well as program development and operations support, for this initiative. This work assignment will focus on the activities related to outreach to the consumers of

WaterSense labeled products and homes (product consumers/end-users and potential homebuyers) and the recognition of exemplary program partners. For each of the following tasks, EPA will make results of previous research and program development materials available as necessary. For all tasks, the contractor will provide all source files and content to EPA with final deliverables. The contractor shall be familiar with EPA's Office of External Affairs and Environmental Education (OEAAE) guidelines, standards, best practices, technical requirements for Web site design and publications and all deliverables shall comply with those requirements.

## **II. OBJECTIVE**

The objective of this work assignment (WA) is to support the communications and outreach efforts of the WaterSense program for the period of performance. It also covers partner support for the indoor residential portfolio support for the WaterSense recognition program, including activities to provide administrative support, strategic input, and implementation support.

The WaterSense label indicates to consumers, facility managers, potential homebuyers, etc. that the product meets EPA's criteria for water efficiency and performance. EPA works to raise the awareness of the label and encourages consumers to look for the label in order to save water. The communications and outreach efforts outlined in this work assignment relate to the creation of and dissemination of information to consumers (when referring to consumers in this work assignment, it applies to any potential end-user of a WaterSense labeled product or new home). This work assignment includes activities to provide administrative support which will entail the creation of strategies and other deliverables to contribute to increased awareness of the WaterSense program, awareness of the label and the importance of water efficiency.

In order for the contractor to fulfill the requirements of the tasks specified in this work assignment, it will require information, reports, analysis and other programmatic details from other work assignments under this contract; however no work will be duplicated on any two work assignments. All deliverables shall be posted to the ERG/WaterSense project site unless otherwise specified by the WACOR. While every effort has been made to anticipate programmatic needs and deliverable timeframes, the contractor may be asked to complete a task assignment within the scope of the WA on a shorter time frame than originally anticipated.

## **III. TASK DETAIL**

The contractor shall perform the following tasks:

### **Task 0 - Work Plan, Budget Development and Management**

The contractor shall prepare a detailed work plan and budget for the accomplishment of the indicated tasks in accordance with the clause Work Assignments (EPAAR 1552.211-74). The work plan shall include a description of: (a) proposed staff; (b) an estimate of hours to be spent on each task by each staff person (prime and subcontractors); and (c) a list of deliverables, with due dates and schedule for deliverables. This task also includes monthly progress and financial reports which shall conform to the requirements particularized to the clause, F.3 MONTHLY PROGRESS REPORT (EPAAR 1552.210-72) (JUN 1996).

The contractor shall meet with the WACOR and/or the Alternate WACOR either in person or via telephone approximately two (2) hours per month to discuss work assignment planning issues. During this regular meeting, the contractor shall be prepared to discuss updates for tasks outlined below and the contractor shall provide a summary update for tasks via email before each meeting. The contractor shall meet with the WACOR on specific topics when necessary as directed by the WACOR, not to exceed ten (10) hours of meetings for this period of performance.

### **Task 1 – Program Planning**

The contractor shall provide support to the WaterSense program in looking to the future, and if needed reevaluate our guiding principles for WaterSense marketing. The contractor shall review current tools and templates and assess if they remain easy-to-use and up-to-date to ensure ease of use by partners. The contractor shall brainstorm and present new ideas for shareable content that is more visually eye-catching and simpler to comprehend to EPA. This may include ideas for making campaigns easy for partners to implement on limited budgets and timelines. This task will include organizing meetings with ten to fifteen (10-15) stakeholders to obtain feedback on program successes and future direction. The contractor shall develop meeting agendas, summarize findings and work with EPA to refine feedback into a marketing plan that may include a framework for marketing campaigns to the next level to better engage partners, promote the WaterSense brand, and raise consumer awareness. The marketing plan should complement the overall program plan, goals and objectives.

### **Task 2 – General WaterSense Outreach, Media Support, and Monitoring**

The contractor shall support development and implementation of a national and local outreach strategy to help promote WaterSense, labeled product availability, demonstrate community support for the program, and remind consumers and other purchasers to “look for the WaterSense label” on specific water-efficient products and/or new homes. The target audience is considered consumers, potential homebuyers, and other purchasers of WaterSense labeled products. The outreach planning shall include recommended strategic approaches to getting the WaterSense messages to the general public and shall include the following:

#### **1. Media Outreach**

The contractor shall update, as necessary, the overall WaterSense local and national media outreach strategy for the coming year. This strategy shall outline the specific tactics that will be undertaken throughout the year to meet EPA’s objectives. The strategy shall be presented to the WACOR in an outline of activities and costs not to exceed five (5) pages and in an in-person, one-hour meeting. The media strategy shall include approaches for informing the public of the value of water efficiency and that customers shall look for the WaterSense label to save water and protect the environment and shall build on the 2012 strategy, which the contractor is in possession of. Media campaigns and events could tie to a particular time of year, product area, or other news hook or they may target specific communities based on their water supply issues, conservation program viability, and interest in promoting the WaterSense brand. The contractor shall assume media outreach around the following events: Fix a Leak Week 2015, Earth Day, Sprinkler Spruce-Up, summer water use messaging, Shower

Better, promotion of the partner of the year awards, and in the event of new specifications. As part of this plan, the contractor shall recommend appropriate times for EPA press releases and shall plan to draft the recommended press releases; the contractor may assume two (2) to three (3) releases during the work assignment period of performance. The plan shall also include metrics and measurement strategies for measuring success of strategies. The contractor shall deliver quarterly reports to the WACOR on progress and measurement of overall strategy. The contractor shall assume one (1) round of EPA feedback and revisions on this plan. The contractor shall develop a target media list for WACOR review and approval that is sorted by program area for the various outreach activities. The contractor shall start with the existing media list developed under previous period of performance and update the list to include new program areas and shall be sure to include any relevant online media outlets. The contractor shall also schedule and participate in (by phone or in person) 30-minute monthly check-in calls on the status of activities outlined in this plan. Relevant subcontractors or consultants shall be included on this call.

On an ongoing basis, the contractor shall identify opportunities to notify trade press of WaterSense program activities. The contractor shall draft these trade press blast emails and submit them to the WACOR for approval. Assume two (2) to three (3) blast trade emails over the WA period of performance. The contractor shall also monitor trade and consumer media outlets in order to identify new additional target publications for blast emails or other outreach efforts.

When opportunities are identified by the contractor and approved by the WACOR, the contractor shall develop targeted articles in support of media strategy developed above (i.e. to support news hooks and events highlighted above) for specialty magazines (e.g. targeting Plumbers, the home remodeling consumer or home-buying consumer) These may be online publications. The contractor shall assume three (3) to four (4) such articles during the period of performance.

The contractor shall also provide support to draft email communications to respond to reporters' questions. The contractor shall provide support to WaterSense staff and senior EPA management public media appearances on behalf of WaterSense matters, responses to and development of articles on WaterSense matters, and other interactions with the media on WaterSense matters. EPA estimates this will require four (4) to five (5) instances when the contractor will be required to support the development of general WaterSense articles, power point presentations, or talking points.

The EPA does not plan to place paid advertisements and therefore must rely on earned media and public service announcements (PSAs) as primary tools for promoting the program. The contractor shall update as appropriate target media lists and place the PSAs after approval of target media list from the EPA WACOR. The contractor shall include PSA placements in the overall media tracking outlined above.

## 2. Non-media outreach

The contractor shall provide support for the implementation of non-media strategies to

reach consumers and other purchasers with the message to look for the WaterSense label. The contractor shall support the development of “viral” tools, such as online webinars, videos, email pledge campaigns, contests and other creative ways to encourage consumers to pass the message along shall be developed, and the contractor shall track the success of these efforts based on number of downloads, pledges taken, etc. These ideas or campaigns shall be consistent with ongoing WaterSense marketing efforts and may utilize Web tools where appropriate. Each of these ideas shall be vetted through the WACOR for approval prior to development. The contractor shall plan to present ideas informally by sending bulleted lists of ideas in emails, in advance of regular update meeting and shall be prepared to discuss in regular update meetings. Through technical direction, the WACOR will select approximately three to four concepts for development and deployment by the contractor. For each of the selected concepts, the contractor shall deliver a draft for EPA comment and within two (2) weeks of receiving EPA comments, the contractor shall deliver a final draft for final WACOR approval.

The contractor shall plan to conduct other general WaterSense outreach and brand support. During the period of performance of this work assignment, this shall likely include developing several new state fact sheets and vetting them with the EPA WaterSense regional liaisons and partners as appropriate, and finalizing them after EPA WACOR approval for web dissemination. The contractor shall assume the development of fact sheets for three to five (3-5) new states during the period of performance.

The contractor shall provide continued logistical support for the “We’re for Water” outreach campaign throughout the period of performance of this WA. This shall include planning, coordinating with program stakeholders, and creating printed collateral or web-based materials to promote the campaign or to be used during the outreach campaign. The contractor shall assume that up to two (2) materials for the “We’re for Water” outreach campaign will need to be created during the period of performance. The contractor shall support the development of online content or tools to create buzz around the campaign, fostering relationships with program partners and developing information that will help them promote the We’re for Water campaign. The contractor shall also propose appropriate information and materials to be developed for partner site for WaterSense partners. The contractor shall submit recommended updates to the existing WaterSense brand materials and key messages documents (assume two to three (2-3) documents). In some cases existing tools and materials shall be customized or new materials developed for specific parties as defined by EPA in conjunction with specific events or outreach activities.

### 3. Special Promotions

As part of the overall WaterSense outreach, the contractor shall begin to develop for the seventh annual “Fix a Leak Week” campaign, which will run in March 2015. , The contractor shall begin brainstorming ideas for “Fix a Leak Week” 2015, as assigned by the EPA WACOR. ; The contractor shall also develop a one to two page “Fix a Leak Week” 2014 lessons learned/ideas white paper, including media coverage summaries with recommendations for “Fix a Leak Week” 2015. The contractor shall update, if necessary, “Fix a Leak Week” 2014 materials to be appropriate for “Fix a Leak Week”

2015. The contractor shall make any necessary final revisions/updates to fact sheets, tips, hand-outs, text used for the website, regional specific facts in support of the partner media event and make any necessary updates, corrections or modifications based on discussions with the WACOR.

The contractor shall prepare for the “Sprinkler Spruce-Up” campaign. The contractor shall draft materials for the third annual “Sprinkler Spruce-Up” campaign, which will run in May 2015. The contractor shall review tools and resources developed for the 2014 campaign and make any necessary revisions/updates to fact sheets, tips, hand-outs, text used for the website

#### 4. Monitoring

The contractor shall monitor and measure the media coverage of the WaterSense program., The contractor shall: maintain the WaterSense media monitoring process, coordinating weekly media searches and distribution of article summaries to interested parties, “Articles of Interest”, monthly clip reports from a media clipping service, and radio/television broadcast monitoring for mentions of WaterSense. The contractor shall also deliver via email to the WACOR a monthly summary of “WaterSense in the News.” Based on the monitoring outlined above, the contractor shall collect the results of media coverage and calculate the numbers in terms of circulation, impressions, and “ad value.” These statistics will be summarized in a spreadsheet to be delivered to the WACOR on a quarterly basis. The spreadsheet shall include quarterly (or monthly) totals and a cumulative total since program inception.

In addition to the specific media monitoring above, the contractor shall include with the statistics mentioned above a summary of the results of all outreach activities. The summary shall include estimates of target audience reached (i.e. through website hits, materials distributed, etc.). The contractor shall include in the summary some tracking of external feedback on the program and their recommendations for (a) improving distribution of materials; (b) content of materials; (c) improving visibility of the program and (d) ultimately, increasing awareness of the WaterSense brand. This overall summary shall be provided to the WACOR in Word format via email at the end of the WA performance period.

#### **Task 3 – Online Outreach**

The contractor shall provide support to develop online content targeted to the consumer. The primary tool shall be the quarterly WaterSense Current E-newsletter. The contractor shall develop this newsletter (for planning purposes assume two (2) newsletters during the period of performance). The contractor shall deliver a proposed outline to the WACOR and based on WACOR feedback, develop the actual newsletter text and blast email text. The contractor shall assume one round of EPA WACOR comments before finalizing the text. The contractor shall deliver the final text and recommended image files to the WACOR ready for posting to EPA WebPages. The contractor shall send a blast email to all WaterSense stakeholders in WaterSense’s Salesforce list with the e-newsletter once the newsletter has been posted to the EPA website.



The contractor shall also develop relevant and timely new ideas for the widgets on the WaterSense webpage. The contractor shall assume three to four (3 to 4) widget concept ideas are to be developed during the period of performance. The contractors shall also layout WACOR-approved widget concepts and code the widgets after receiving EPA approval. The contractor shall also develop ideas for other web tools to deliver the WaterSense message to the consumer. Ideas shall include widget ideas, banner ideas, improvement to existing pages and tools for WaterSense product end-users. The contractor shall plan to discuss these ideas once per month in the regular meetings described in Task 0. The deliverable is a simple summary of ideas with a sentence or two description of how they shall be implemented.

#### **Task 4 – Development of Materials to Promote WaterSense**

When requested by the WACOR, the contractor shall develop print materials to support overall WaterSense brand. The materials shall include print materials such as brochures. In addition to print materials, the contractor shall also propose ideas for more interesting and engaging ways to present information. The contractor shall assume development of up to two (2) “brochures”. The contractor shall assume two (2) EPA WACOR reviews before finalizing the documents. After the receipt of EPA WACORs approval, the contractor shall deliver a Government Printing Office (GPO)-ready print package to the WACOR. Copies shall be printed by GPO.

At the direction of the WACOR, the contractor shall propose WaterSense promotional items for the purpose of educating the American public on water efficiency and WaterSense and driving traffic to the WaterSense booth at conferences. The contractor shall assume updating and purchasing one item and developing and purchasing one new item. Promotional items in the past have included USB thumb drives, pens, and pads. After EPA WACOR approval, the contractor shall assume two (2) EPA WACOR reviews before finalizing the item. The contractor shall also abide by the EPA rules and regulations on novelty items.

The contractor shall also plan to support consumer communications through partner outreach in the form of collaborating with partners to get the consumer message out. The contractor shall assume this will include developing information/write-ups to be included in the WaterSense partner pipeline (assume two short one to two (1-2) paragraph snip-its/articles) and slides for the WaterSense partner forums (assume providing slides for one (1) forum). Both of these activities, the WaterSense partner pipeline and WaterSense partner forum are organized through WA B-01; however the contractor shall assume one comment/review from the EPA WACOR from this WA and once approved, shall then coordinate with ERG staff on WA B-01 to include the deliverables from this subtask into the activities in WA B-01.

#### **Task 5 –Briefings, Facts and Figures**

The contractor shall provide support to complete the following subtasks that will assist the WaterSense program in communicating their messages to the public:

The contractor shall maintain the accuracy and timeliness of the WaterSense fact book and factoid catalogue. The contractor shall maintain and ensure that the facts and figures are current and relevant to the program activities. The contractor shall tweak interesting “factoids” from the existing fact book about the program to pique the media’s interest and deliver them to

the WACOR to post to the media section of the public website. The contractor should assume the creation of no more than one to two (1-2) new factoids, upon request of the WACOR. The factoid may be an update of an existing factoids (new data has become available, e.g. revised rate survey) or just looking at it a different way to help the WaterSense program communicate its message. The factoid shall be just one sentence and shall pertain to current program activities (i.e. specification releases, news announcements, etc.) The contractor shall include thorough documentation of the numbers in an Excel spreadsheet, including sources and links to source reports, and in accordance with the format developed under EP-C-09-008 WA 2-12.

WaterSense is a multifaceted and rapid-paced initiative, therefore, "firedrills" or quick turnaround requests are identified on a regular basis. Most of these are short-term, immediate support such as providing marketing expertise, doing a simple analysis, providing a technical review and similar type activities. Assume five (5) to six (6) of these types of requests during the WA period of performance, each with no more than five to ten (5-10) hours of LOE. Firedrills will likely be due within one to two (1-2) days of technical direction from the EPA WACOR.

#### **Task 6 – WaterSense Partner Recognition Program**

For this task, the Task Manager is Karen Fligger, a member of the WaterSense team. A task manager will be the primary technical contact for the specified task and participate in technical communication with the contractor. However, any technical direction will still come from the EPA WACOR.

1. **Awards Program Documents** – The contractor shall maintain and update WaterSense Awards program documents in response to changes in the program such as changes to or the addition of new partner categories (e.g., sustained excellence and professional certifying organizations). These documents include but are not limited to: Partner of the Year (PoY) application forms and instructions. The contractor shall provide editorial revisions to approximately six (6) documents for the 2015 awards cycle as specified in the Deliverable Schedule. Changes to existing document layouts and formats are anticipated to be minor to accommodate editorial revisions. The contractor shall also provide support to prepare recognition materials. Final program documents, that have received EPA WACOR approval, shall be uploaded to the WaterSense website and the WaterSense project site as appropriate.
2. **Preparation of Recognition Program Materials** - Upon technical direction the contractor shall provide support to prepare recognition program materials (e.g., graphics, briefing slides, talking points, fact sheets, certificates, letters of congratulations, draft press releases, journal articles, physical awards/plaques and other materials) for use within and outside the Agency. The contractor shall provide support for approximately three (3) briefings, fact sheets, or other presentations anticipated over the course of the period of performance. The contractor shall develop draft versions that will be finalized and approved by the WACOR based on the deliverable schedule. The contractor shall also provide support for one draft press release, one journal article, one PSA, awards ceremony talking points, and at least one additional item (see examples of possible items above) to be determined by the WACOR at a later date. The contractor shall design materials for the WaterSmart Innovations Conference (WSI) 2014, which may include a conference brochure ad and/or banner for the WaterSense booth. The contractor shall prepare draft certificates and letters

of congratulations for each of the PoY winners (totaling approximately fifteen (15)). The contractor should base these materials off of what was created in 2013 under Contract # EP-C-09-008 WA 4-12. The contractor shall develop draft materials and upon approval by WACOR shall finalize materials to be placed on the website and delivered to EPA WACOR.

3. Awards Ceremony Planning and Support – In order to support EPA’s WaterSense PoY Awards Banquet co-sponsored by the Alliance for Water Efficiency (AWE) at the WaterSmart Innovations Conference (WSI) in Las Vegas, NV in October 2014 the contractor shall coordinate with the Southern Nevada Water Authority (SNWA) conference organizers and Alliance for Water Efficiency (AWE) staff on logistics as listed in detail below. The contractor shall always represent themselves as contractors to EPA. The contractor shall travel to the conference, assist in planning and set-up on location, and attend the ceremony to ensure that the awards ceremony portion of the banquet runs as planned. For purposes of estimation, the trip shall last for approximately three (3) days. Supporting activities shall include but are not limited to: confirming ceremony location, room layout, AV equipment, photographer, awards ceremony program, and sending any necessary materials (recognition, promotional and outreach materials etc) to SNWA and/or AWE. Conference related purchases are not expected to exceed \$20,000 under this contract. OWM will provide an executed EPA Form 5170.. All additional costs must be approved by the Contracting Officer before they are incurred. The contractor shall confirm award winner attendees and who will accept the award at the ceremony. As directed by the WACOR, the contractor shall take and facilitate the shipment of winners’ photographs and conduct other conference follow-up. The contractor shall provide a weekly email to the WACOR updating progress of award ceremony coordination in the months leading up to the ceremony.
4. Media Outreach: Once the winners are determined, the contractor shall update the media outreach plan for awards.. The contractor shall provide support to WACOR in implementing the media outreach plan. Activities under this subtask will likely include a one hour conference call with the award winners to coordinate media outreach efforts, updating the list of target media, or ‘pitch list’, drafting an EPA press release and drafting a media kit for use at the conference. The contractor shall submit the aforementioned deliverables in draft to the WACOR and upon incorporation of WACOR comments and approval by WACOR, the contractor shall finalize and make them web-ready. The contractor shall also pitch the award winner story and PSA to the updated and approved pitch list. The contractor shall also support the EPA in scheduling interviews with EPA staff and WaterSense Partner of the Year award winners.
5. Web Content – The contractor shall develop content for the WaterSense website as directed by the WACOR. Web content development for updates will likely be needed to announce the closing of the application period. The content is anticipated to consist of updates of current text on pages and the creation of entirely new pages. All web content shall comply with section 508 and other EPA’s Office of External Affairs and Environmental Education (OEAAEE) guidelines. The contractor shall develop text for approximately two to three (2-3) web updates/postings throughout the period of performance.

#### **Task 7 – Residential Partner Support**

1. Support Specification Development – During the specification development process, the contractor shall provide stakeholder support. This may include hosting webinars, calling potential partners for feedback, assessing various stakeholder positions, and/or analyzing support and opposition to a particular specification.

Upon the release of both a draft and/or final specification by the EPA WaterSense team for a residential plumbing product, the contractor shall provide assistance communicating with partners about the new specification. This support shall include, but may not be limited to: a specification rollout plan including messaging recommendations, facts and figures, fact sheets, web text, press releases, and trade press outreach/article development. One draft or final specification is expected to be released during the period of performance.

Additionally, the contractor shall conduct research and develop the new product notification template for the new specification, in cooperation with the WACOR and relevant outside experts.

The contractor shall also coordinate outreach to manufacturers of the new product to assist them with certification and label usage concerns. The contractor shall recommend to the EPA WACOR for approval, partner outreach ideas for the new specification. The contractor shall implement the recommendations after approval by the WACOR. Outreach may include the development of fact sheets or special topic webinars.

2. General Partner Support – The contractor shall work with existing program partners to answer questions and troubleshoot new issues that may arise. Generally, these are questions which come to our attention through the WaterSense Helpline and involve technical assistance regarding the product specifications, use of the label, or special topics unique to a specific manufacturer or retailer.
3. Targeted Audience Outreach – The contractor shall develop and implement strategies for targeted outreach to the following audiences:
  - a. Plumbers - Many residential customers have plumbing fixtures replaced by professional plumbers. The contractor shall develop and implement a strategy for helping plumbing professionals to encourage their customers to replace older inefficient fixtures with WaterSense labeled fixtures. Helping the plumbers to better inform their clients by selecting WaterSense labeled products will lead to a more water-saving bathroom, while not sacrificing performance. Examples of tools may include: sample talking points, Q&As, training for plumbers, and brochures and fact sheets.
  - b. Real Estate Agents – Remodeling a bathroom with WaterSense labeled fixtures could boost a home's resale value, since the new fixtures will save homeowners water and money on utility bills. Therefore, to compliment the WaterSense new homes program, the contractor shall develop and implement a strategy for helping real estate agents encourage sellers to make this remodeling decision, as well as to market the home with its new, water-saving bathroom. Examples of tools may include: sample talking points, Q&As, sample media materials, brochures and fact sheets, yard sign templates, educational bathroom counter tent cards, and web

templates.

#### **Task 8 – Consumer Research**

In order to successfully support the WaterSense program, the contractor shall collect publicly-available information on current market trends with regard to consumer attitudes towards green products and water efficiency. This research shall result in one (1) brief (three (3) to five (5) page) report in this period of performance covering the following potential topics: how Americans define green, what drives their purchase behavior, in which categories they're searching for green products, what messaging resonates with them and what price points they are willing to pay. It may also cover American attitudes towards energy efficiency topics, such as: the products they purchase, who they blame for rising prices, how they prioritize energy efficiency, and what messages and programs motivate behavior change.

#### **Task 9– Annual Accomplishments Report**

The contractor shall develop a program accomplishments report for the program activities occurring in calendar year 2014. The report shall be approximately one (1)-two (2) pages in length using a combination of images and graphics to summarize program results. The contractor shall work with EPA to incorporate this information into the WaterSense website. No web development and coding will be required under this task as the contractor will not have primary responsibility for the web design, only the content.

### **IV. DELIVERABLES**

Unless specified above, due dates for deliverables are outlined in the chart below. The deliverables of these tasks are highly dependent on the progress and coordination of work with outside stakeholders, as well as other parts of the WaterSense program (e.g., specification development). All activities shall begin at the direction of the WACOR unless otherwise noted. Due dates for draft documents are identified in the table below.

Documents prepared under this contract shall be provided in electronic format, compatible with the MS Office 2007 Suite. All documents shall be provided first as drafts. EPA may provide comments for the contractor to incorporate into the final documents. The final document format will be agreed upon by the EPA WACOR and the contractor in advance. The contractor shall also provide electronic copies of any data files developed in the course of this work assignment.

The contractor shall discuss any disagreements with or questions on EPA-provided comments prior to submission of a final document. All deliverable revisions will be due back to the EPA WACOR no later than fifteen (15) calendar days after the contractor receives EPA feedback unless otherwise specified by the WACOR. If EPA chooses not to provide comments, the draft document will be accepted as final, and the contractor will be notified that no revisions are required.

**Deliverable Schedule:**

<b>Task</b>	<b>Subtask</b>	<b>Deliverable</b>	<b>Due Date</b>
<b>0</b>		Work plan	Fifteen (15) calendar days after the contractor receives the work assignment.
<b>1</b>		Planning	Meetings within two (2) weeks of receipt of details from the WACOR. Final plan two (2) weeks after conclusion of planning meetings.
<b>2</b>	Subtask 2.1	Revamped/revised media outreach strategy	Within two (2) weeks of receipt of details from the WACOR, to be completed by end of the period of performance
		Quarterly highlights reports on outreach progress and measurement including media placements, web hits when appropriate, and other measurements of reach.	Two (2) reports during this period of performance, by the end of February 2015 and May 2015
		Press releases for major program announcements (3-4 over period of performance)	Within three (3) weeks of receipt of details from the WACOR to coincide with major program announcements outlined in the media strategy.
		Revised target media list.	Within three (3) weeks of receipt of approved work plan.
		Trade press blast emails (2-3 over period of performance)	Within three (3) weeks of receipt of details from the WACOR to coincide with major program announcements outlined in the media strategy.
		4-5 trade articles as opportunities are identified. Draft and final versions.	Within two (2) weeks of receipt of details from the WACOR; assume two (2) weeks for EPA WACOR review.
		Media question responses	Within one (1) day of receipt of details from EPA WACOR unless otherwise specified.
	Subtask 2.2	Draft ideas for viral or online outreach tools	Within two (2) weeks of receipt of details from the WACOR
		Final ideas list of proposed viral or online tools.	Within two (2) weeks of receipt of EPA comments
		Draft viral tools	Within two (2) weeks of receipt of details from the WACOR
		Final viral tools	Within three (3) weeks of receipt of EPA comments
		Draft state fact sheets	Within three (3) weeks of receipt of details from the WACOR
		Final state fact sheets in web-ready	Within two (2) weeks of receipt of EPA

		format	comments
	Subtask 2.3	Final Fix a Leak Week 2013 materials and pitching	Within two (2) weeks of receipt of details from the WACOR, to be completed by end of February 2014
		Lessons learned/ideas white paper for Fix a Leak Week 2015 prep	Within two (2) weeks of receipt of details from the WACOR, to be completed by end of June 2014
	Subtask 2.4	Weekly "WaterSense Articles of Interest" Distribution via email to existing distribution list	Every Tuesday
		Quarterly outreach and media results report, to be emailed to WACOR and included in highlights/measurement report in 1.1.	End of February and May
		Monthly "WaterSense in the News" Distribution via email to existing distribution list to be provided by the WACOR	1 <sup>st</sup> of every month
<b>3</b>		Outline for proposed WaterSense Current quarterly e-newsletter	Within two (2) weeks of receipt of details from the WACOR
		Draft WaterSense Current quarterly e-newsletter and accompanying draft email	Within two (2) weeks of receipt of EPA comments on outline
		Final WaterSense Current quarterly e-newsletter and send accompanying email	Within two (2) weeks of receipt of EPA comments
		Widget concepts	Within two (2) weeks of receipt of details from the WACOR
		Draft widgets	Within two (2) weeks of receipt of EPA comments and sign off on concepts
		Final widgets	Within two (2) weeks of receipt of EPA comments
		Online consumer outreach ideas	First week of March and May
<b>4</b>		Draft print material in support of general WaterSense messages.	Within three (3) weeks of receipt of details from the WACOR
		Draft print material in support of general WaterSense messages.	Within one (1) week of receipt of EPA comments
		Final print material in support of general WaterSense messages.	Within one (1) week of receipt of EPA comments
		Draft update of one existing promotional item	Within two (2) weeks of receipt of details from the WACOR
		Final promotional item	Within three (3) weeks of receipt of EPA comments



		Draft mock-up of new promotional item	Within two (2) weeks of receipt of details from the WACOR
		Final promotional item	Within three (3) weeks of receipt of EPA comments
		Draft input to partner communications (partner forum or partner pipeline)	Within two (2) weeks of receipt of details from the WACOR
		Final input to partner communications (partner forum or partner pipeline)	Within one (1) week of receipt of EPA comments
<b>5</b>		Draft talking points/briefing materials on WaterSense program	Within two (2) weeks of receipt of details from the WACOR
		Final talking points/briefing materials for briefings	Within one (1) week of receipt of EPA comments
		Ongoing maintenance of WaterSense program's facts and figures	Ongoing
		New or revised factoid posted to the WaterSense project site.	Within two (2) weeks of receipt of request from the WACOR .
		Firedrills	Within one (1) to three (3) days from receipt of details from the WACOR
<b>6</b>	Subtask 6.1	Editorial Review/Annual Update of Existing Awards Program Documents	Within two (2) weeks of receipt of details from WACOR
		Draft any new Awards Documents	Within three (3) weeks of receipt of details from WACOR
		Finalize any new Awards Documents	Within two (2) weeks of EPA comments
	Subtask 6.2	Draft program materials	Within three (3) weeks of receipt of program document details from the EPA WACOR
		Final program materials	Within two (2) weeks of receipt of EPA comments
		2 <sup>nd</sup> Draft program materials	Within three (3) weeks of receipt of program material details from the WACOR
		2 <sup>nd</sup> Final program materials	Within two (2) weeks of receipt of EPA comments
	Subtask 6.3	Coordinate Awards Ceremony Planning and Support	Within one (1) week of receipt of details from the WACOR, to be completed by end of September 2013
		Weekly award ceremony coordination status update email	Weekly
	Subtask 6.4	Update Media Plan	Within two (2) weeks of receipt of details from the WACOR
		Media Plan Implementation	As outlined in WACOR-approved strategy
	Subtask 6.5	Develop text for web updates/postings	Within two (2) weeks of receipt of details from the WACOR
		Finalize text for web updates/postings	Within one (1) week of receipt of EPA comments
<b>7</b>	Subtask 7.1	Provide Spec Rollout Plan	At least six (6) weeks prior to release of draft



			spec
		Revise Spec Rollout Plan	At least two (2) months prior to release of final spec
		Conduct Research and Develop Product Notification Form	By release of final specification
		Present Recommendations to WACOR for partner outreach regarding new spec	Within one (1) week of release of draft specification
		Implement partner outreach regarding new spec	Start within one (1) week of WACOR approval and finish prior to release of final specification
	Subtask 7.2	Draft Response to Partner Query, send to WACOR for review	Within one (1) day of receipt from partner
		Send response to Partner	Within six (6) hours of receipt of final answer from WACOR
	Subtask 7.3.a	Submit draft strategy to EPA for review	Within two (2) weeks of receipt of details from WACOR
		Submit final strategy to EPA for review	Within two (2) weeks of EPA comments
		Submit draft tools to EPA for review	Within two (2) weeks of receipt of details from WACOR
		Submit final tools to EPA for review	Within two (2) weeks of EPA comments
	Subtask 7.3.b	Submit draft strategy to EPA for review	Within two (2) weeks of receipt of details from WACOR
		Submit final strategy to EPA for review	Within two (2) weeks of EPA comments
		Submit draft tools to EPA for review	Within two (2) weeks of receipt of details from WACOR
		Submit final tools to EPA for review	Within two (2) weeks of EPA comments
8		Report due to EPA	Within three (3) weeks of receipt of details from WACOR
9		Initial suggestions for Accomplishments Report	With two (2) weeks of receipt of details from EPA

## V. MISCELLANEOUS

### A. Software Applications and Accessibility.

Word processing files delivered to the Government shall be Microsoft Word, 8.0 or higher. All software and electronic information technology shall conform to the requirements relating to accessibility as detailed to the 1998 amendments to the Rehabilitation Act, particularly, but not limited to, § 1194.21 Software applications and operating systems and § 1194.22 Web-based intranet and internet information and applications. See: <http://www.section508.gov>.

- Preferred text format: MS Word, 8.0 or higher (MS Office 2003 or higher)
- Preferred presentation format: Power Point, Office 2003 or higher
- Preferred graphics format: Each graphic is an individual GIF file

- Preferred portable format: Adobe Acrobat, Version 6.0

## **B. Travel.**

Travel is expected for this work assignment. Any travel chargeable to this work assignment shall be allowable only in accordance with the limitation of FAR 31.205-43 and FAR 31.205-46, and must be approved by the EPA Contracting Officer Representative (COR) prior to travel taking place. . The WACOR will provide at least a two week notice of any non-local travel. For planning purposes, the contractor shall assume three (3) to four (4) two (2) to three (3) day trips, will be required over the course of this Work Assignment. As outlined in Task 6, one trip requires attendance at the WaterSmart Innovations Conference for approximately three (3) days in Las Vegas, NV held from October 8-10 2014. Any other specific travel proposed for completion of this work assignment must be approved in writing by EPA in advance.

## **C. Release of Data and Information.**

All information collected and developed under this Agreement is the property of the U.S. EPA and shall not be released to the public or used for other work or projects, including EPA or other federal work, without written authorization of the CO.

## **D. Conference/Meeting Guidelines and Limitations:**

All appropriate clearances and approvals required by Agency policy in support of any and all conference related activities and expenses, including support of meetings, conferences, training events, award ceremonies and receptions, including the form 5170 for all meetings costing more than \$20,000, shall be obtained by the EPA Contract Level COR as needed and provided to the Contracting Officer (CO). Work under conference related activities and expenses shall not occur until this approval is obtained and provided by the EPA Contract Level COR. Conference expenses are all direct and indirect costs paid by the government and include any associated authorized travel and per diem expenses, room charges for official business, audiovisual use, light refreshments, registration fees, ground transportation and other expenses as defined by the Federal Travel Regulations. All outlays for conference preparation should be included, but the federal employee time for conference preparation should not be included. After notifying EPA of the potential to reach this threshold, the Contractor shall not proceed with the task(s) until authorized to do so by the Contracting Officer.

## **E. Contractor identification**

Contractor personnel shall always identify themselves as Contractor employees by name and organization and physically display that information through an identification badge. Contractor personnel are prohibited from acting as the Agency's official representative.

The Contractor shall refer any questions relating to the interpretation of EPA policy, guidance, or regulation to the Work Assignment Contracting Officer Representative.

## **F. Technical Direction**

The Contract level COR or an authorized individual is permitted to provide technical direction. Technical direction must be within the statement of work of the contract and includes: (1) Direction to the

contractor which assists the contractor in accomplishing the Statement of Work, (2) Comments on and approval of reports or other deliverables. Technical direction will be issued in writing or confirmed in writing within five (5) calendar days after verbal issuance. One copy of the technical direction memorandum will be forwarded to the Contracting Officer and the Contract Level Contracting Officer Representative.

#### **G. Management Controls**

All printing shall be in accordance with clause H.2 (Printing) of the contract.

### **VI. QUALITY ASSURANCE SURVEILLANCE PLAN**

All tasks are to be completed on or ahead of schedule unless EPA and the contractor mutually agree to a schedule change.

The contract level QASP applies to this work assignment.

### **VII. RELEASE OF DATA AND INFORMATION**

All information collected and developed under this Agreement is the property of the U.S. EPA and may not be released to the public or used for other work or projects, including EPA or other federal work, without written authorization of the CO.

<b>EPA</b> United States Environmental Protection Agency Washington, DC 20460 <b>Work Assignment</b>						Work Assignment Number B-03				
						<input type="checkbox"/> Other <input type="checkbox"/> Amendment Number:				
Contract Number EP-C-14-014			Contract Period   07/18/2014   To   02/13/2015 Base <input checked="" type="checkbox"/> Option Period Number			Title of Work Assignment/SF Site Name WaterSense New Homes and Outdo				
Contractor EASTERN RESEARCH GROUP, INC.					Specify Section and paragraph of Contract SOW					
Purpose: <input checked="" type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Close-Out <input type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Incremental Funding <input type="checkbox"/> Work Plan Approval						Period of Performance  From   08/14/2014   To   02/13/2015				
Comments:										
<div style="display: flex; justify-content: space-between;"> <input type="checkbox"/> Superfund         <span>Accounting and Appropriations Data</span> <input checked="" type="checkbox"/> Non-Superfund       </div>										
Note: To report additional accounting and appropriations date use EPA Form 1900-69A.										
SFO (Max 2) <input type="checkbox"/>										
Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										
Authorized Work Assignment Ceiling										
Contract Period:		Cost/Fee:			LOE: 0					
07/18/2014 To 02/13/2015										
This Action:					2,030					
Total:					2,030					
Work Plan / Cost Estimate Approvals										
Contractor WP Dated:				Cost/Fee:			LOE:			
Cumulative Approved:				Cost/Fee:			LOE:			
Work Assignment Manager Name   Karen Flogger  <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>							Branch/Mail Code: Phone Number   202-564-2992 FAX Number:			
Project Officer Name   Robin Danesi  <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>							Branch/Mail Code: Phone Number: 202-564-1846 FAX Number:			
Other Agency Official Name   Kathleen Rechenberg  <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>							Branch/Mail Code: Phone Number: 513-487-2853 FAX Number:			
Contracting Official Name   Sandra Stargardt-Licis  <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>							Branch/Mail Code: Phone Number: 513-487-2006 FAX Number:			

**PERFORMANCE WORK STATEMENT**  
**Technical Evaluation and Market Assessment Support for the**  
**WaterSense Program**  
**Contract No. EP-C-14-014**  
**Work Assignment No. B-03**

**I. ADMINISTRATIVE (PWS Area 3.3) Original Estimated LOE: 2030**

**A. Title: WaterSense New Homes & Outdoor Partner Support**

**B. Period of Performance: Issuance-2/13/15**

**C. Work Assignment Contracting Officer Representative (WACOR)**

Karen Fligger  
US EPA (MC: 4204M)  
1200 Pennsylvania Avenue, N.W.  
Washington, DC 20460  
(202) 564-2992, FAX: (202) 501-2396

**Alternate Work Assignment Contracting Officer Representative (Alt WACOR):**

Alicia Marrs  
US EPA Region 8 (MC: 8P-W-DW)  
1595 Wynkoop Street  
Denver, CO 80202  
(303) 312-6269, F AX: 1-877-876-9101

**D. Quality Assurance:**

The requirements do include environmental measurements, etc., therefore a supplement programmatic quality assurance project plan (PQAPP) is required. The PQAPP submitted under Work Assignment B-01 under this contract is applicable to this Work Assignment. It does not need to be resubmitted.

**E. Background:**

EPA launched WaterSense, a voluntary partnership program to enhance the market for water-efficient products and practices in June 2006. The program seeks to provide information to residential, commercial and industrial consumers to help them select water-efficient products and adopt water-efficient practices; encourage manufacturers and service providers to increase the water-efficiency of their offerings; provide a turn-key approach to promoting water efficiency for local officials and organizations to use in their efforts; and inform the public about the importance of using water resources efficiently.

The Contractor shall provide program development and operation support for this initiative. For each of the following tasks, EPA will make results of previous research and program development materials available as necessary. For all tasks, the Contractor shall provide all source files and content to EPA with final deliverables. For each of the following tasks the

Contractor shall be required to coordinate with other Contractors supporting the water-efficiency program as necessary. The Contractor shall also be required to coordinate certain activities with other EPA offices or other organizations outside of the EPA. Any instance where the contract is communicating with other PEA offices or organizations outside of EPA the Contractor shall communicate that they are working as a Contractor to the EPA's Office of Water. The Contractor shall be familiar with EPA's Office of External Affairs and Environmental Education (OEAAE) guidelines, standards, best practices, technical requirements for Web site design and publications and all deliverables shall comply with those requirements.

## **II. OBJECTIVE:**

The objective of this Work Assignment is to provide support to the WaterSense program partners and stakeholders in two areas: (1) the new homes sector, and (2) the outdoor sector.

This Work Assignment shall include activities to provide administrative support, while maintaining regular contact with EPA personnel. In order for the Contractor to fulfill the requirements of the tasks specified in this work assignment, it will require information, reports, analysis, etc from other WAs under this contract; however no work will be duplicated in any two WAs. While every effort has been made to anticipate programmatic needs and deliverable timeframes, the Contractor may be asked to complete a task assignment within the scope of the task description detailed below on a shorter timeframe than originally anticipated.

## **III. TASK DETAIL:**

The Contractor shall perform the following tasks:

### **Task 1: Contract Management**

#### **Subtask 1.1: Workplan and Budget Development**

The Contractor shall prepare a detailed work plan and budget for the accomplishment of the indicated tasks in accordance with the clause Work Assignments (EPAAR 1552.211-74). The work plan shall include a description of: (a) proposed staff; (b) an estimate of hours to be spent on each task by each staff person (prime and subcontractors); and (c) a list of deliverables, with due dates and schedule for deliverables. This task also includes monthly progress and financial reports which shall conform to the requirements particularized to the clause, F.3 MONTHLY PROGRESS REPORT (EPAAR 1552.210-72) (JUN 1996).

#### **Subtask 1.2- Work Assignment Management**

The Contractor shall coordinate conference calls with the WACOR and task manager (TM) and/or other relevant EPA staff as needed (assumed every two weeks) to discuss progress made within these subtasks. Conference calls will typically last one (1) hour or less. The Contractor shall send a list of topics to be discussed to the EPA WACOR or TM at least one (1) day in advance of each conference call.

### **Task 2: New Homes Partner Support**

For this task, the Task Manager (TM) is Alicia Marrs, a member of the WaterSense team, and alternate work assignment manager for this work assignment. The task manager will be the primary technical contact for the specified task and participate in technical communication with the Contractor. However, any technical direction will come from the EPA WACOR.

All activities listed in this task are contingent upon technical direction from the WACOR. The objective of this task is to provide support for the development and implementation of the marketing and outreach portion of WaterSense's efforts in the new homes sector. This refers to the support of partners who produce, sell, or promote WaterSense labeled new homes in the United States. It involves the Contractor support of conducting outreach within the homebuilding sector to promote the WaterSense program, as well as promoting the new homes program to other WaterSense partners.

#### *Subtask 2.1 – Conduct Sector-Specific Market Research*

In order to successfully support the WaterSense program, the Contractor shall monitor homebuilding sector trends by engaging in ongoing research. This research shall be informal in nature and might consist of discussions with industry experts, reading trade journal articles, and/or perusing relevant websites.

For planning purposes, areas of research may include: the market for water-efficient and green new homes, multifamily homebuilding industry, non-retail purchasing behavior for new homes, identification of potential partners associated with the home building industry, purchasing information and trends for new homes, effective messaging and social marketing for the home buying market, potential cost implications of building a water-efficient new home and other research deemed important to the success of the program.

The results of this ongoing research shall be submitted to the TM in the form of a brief (one (1) page maximum) summary.

#### *Subtask 2.2 – Support Strategic Planning*

EPA will require the Contractor's input in strategic planning for marketing and outreach activities in the new homes sector. This assistance will take the form of an annual (calendar year) outreach work plan, which should be based on research gathered under Subtask 2.1 and collaboration with the TM and WACOR. The strategy should include overarching goals and specific strategies, activities, and timelines for achieving those goals. The contractor will be provided the overarching goals upon issuance of the WA, but the Contractor shall be responsible for identifying strategies, activities, and timelines for achieving those goals. Previous examples of this type of work include the 2010 Partner Outreach Work Plan developed under EP-C-09-008 WA 1-03.

#### *Subtask 2.3 – Maintain a Suite of Industry Targeted New Homes Materials and Partner Tools*

The Contractor shall provide support in developing and maintaining the suite of materials for the New Homes program. This includes but is not limited to: the new homes toolkit for builders, providers, home builders associations (HBAs); recruitment tools for providers, HBAs and other WaterSense partners; supporting materials for plumbers and landscapers; and the homeowner's

manual template. Previously developed tools are available on the partner site, for which the WACOR will provide password access to the following url:  
<http://www2.ergweb.com/wspartner/welcome.html>

In addition to drafting partner tools, the Contractor shall support the development of partner outreach materials. This shall include the drafting and distributing of approximately five blast emails and two (2) to three (3) short articles (one (1) to (2) two paragraphs) in the Partner Pipeline and other affiliated publications. In addition, this shall include drafting and distributing *WaterSense Blueprint*, a quarterly newsletter geared towards partners and stakeholders with interests in building, inspecting/certifying, and promoting WaterSense labeled new homes. *Blueprint* resembles in format and layout the WaterSense Current but subject matter will focus primarily on supporting the WaterSense labeled new homes program.

Many of WaterSense's existing partner materials and tools were originally developed four (4) to (5) five years ago, prior to release of the revised specification for water-efficient new homes, and therefore do not incorporate some aspects of the revised specification. The Contractor shall make recommendations for revising, updating, and improving relevant partner materials and tools to support the new homes portion of the WaterSense program.

In addition, the Contractor shall plan to assist in the development of five (5) to ten (10) new tools/materials and/or revisions to existing materials during this period of performance. Examples of tools/materials may include: sample talking points, case studies, event/trade show materials, sample media materials, training for staff, web templates, bill stuffers, and other materials deemed important to the success of the program.

See below for details:

- a. Develop/Update New Homes Tools: WaterSense Partner Tools provide program partners with resources they need to understand and promote the program to stakeholders and consumers. The Contractor shall support in the development, revisions, updates, and improvements of the New Homes Builder, Provider and HBA Tools. These tools shall include a wide range of materials and templates that help partners promote the WaterSense program and messages, such as: program mark guidelines, sticker/certificate printing tool, sample press releases and letters to the editor, website templates, point of sale materials, tools and messages, brochures, factoids, etc. The Contractor has access to existing tools (also located on the previously mentioned WaterSense project site).

The Contractor shall also provide specific assistance to collect feedback from builder and provider partners on the effectiveness of the homeowner manual template included in the builder partner toolkit on the partner website. The Contractor shall use the information collected to make revisions to the manual and other tools after receiving technical direction from the WACOR.

- b. Develop/Update Non-Builder/Provider Partner Tools: In order to support this program effectively, the Contractor shall update existing tools and create and provide new tools to existing partners and market influencers (such as utilities, local governments, plumbers, landscapers/irrigation professionals, realtors and inspectors) to educate and encourage their clients, members, builders etc to participate in the WaterSense New Homes Program.



#### Subtask 2.4 – New Homes Partner Webinars

, The Contractor shall develop and conduct two (2) to three (3) specific, New Homes topical presentations or webinars to assist WaterSense partners in supporting and implementing the New Homes program as provided in Technical direction from the WACOR. The presentations shall be approximately 1 to 1.5 hours in length and will be web-based. The contractor shall set up the logistics for each call using web-based conferencing software and insure that participants receive all logistical information. The content for the presentations shall be developed in conjunction with activities in work assignments WA B-01 and B-05. The contractor shall take notes during the webinar and provide a meeting summary to the EPA TM within one month of the webinar. For planning purposes, the number of presenters will vary depending on the topic with presenters being from partner organizations, EPA staff and contractor personnel. It is estimated that at minimum one presenter shall be provided for each webinar.

#### Subtask 2.5 –Recruitment & Support of Local Promotional Efforts

The Contractor shall provide support to EPA to recruit and support builder partners for the new homes program. This recruitment will be national with a particular focus on multifamily builders/developers and on target communities identified by EPA. A national recruitment strategy using existing partners and challenge efforts may be phased in to this effort over time if needed. This assistance shall take the form of finalizing a recruitment rollout plan, which should be based on research gathered under Subtask 1.1 and collaboration with the TM and WACOR. The strategies shall include overarching goals and specific strategies, activities, and timelines for achieving those goals. The TM will provide input on the overarching goals, but the Contractor shall be responsible for identifying strategies, activities, and timelines for achieving those goals and all technical direction will be provided by the WACOR. Previous examples of this type of work include the 2010 Partner Outreach Work Plan developed under EP-C-09-008 WA 1-03.

Examples of potential goals may include, but are not limited, to the following: identifying and working with influencers in the industry to promote WaterSense to builders, providers and HBAs, increase WaterSense visibility in the residential new construction marketplace, identify builders/providers/HBAs who are already interested in green building or water efficiency to become WaterSense partners, and use Web 2.0 strategies to increase awareness of the new homes program. Specific activities shall include, but are not limited to:

- a. The Contractor shall support quarterly one (1) -two (2) hour calls and/or webinars with interested builders/providers/HBAs to discuss the certification and labeling process. The Contractor shall identify the appropriate stakeholders to participate, give recommendations on agenda items and develop a preliminary draft presentation for the calls. The Contractor may be asked to set up and/or participate in the call or webinar per direction by the TM.

The Contractor shall support approximately ten (10), one (1) hour long, telephone calls, online webcasts, and meetings with utilities, local/state government, and other key local/state water conservation organizations to thoroughly introduce and incorporate WaterSense's new homes program into a community's water conservation efforts. WaterSense anticipates select stakeholders will request support in initiating and developing

local promotions. Based on previous requests/interactions, the Contractor shall submit a brief (one (1) page) strategy recommending which stakeholders to work with in the event that none request help. The Contractor shall respond to Helpline requests from these interested communities (assume three (3) to five (5) communities) to support the development of local programs and campaigns. Responses may include developing tools to assist in media outreach including Q&As, articles, press releases etc. Responses shall also include, but are not limited to: strategy development, community tools, logistics support for one to two outreach/media events, one half-day workshop for partners, and one public announcement per promotional community. Logistical support for the workshops may include developing agendas, power point presentations, and other materials to support the meeting. The Contractor may be asked to participate in the workshop, and if so may be asked to take notes and provide a meeting summary to the EPA TM within one (1) month of the workshop. The Contractor may be asked to set up and/or participate in the call or webinar per technical direction from the WACOR.

If required, the contractor shall secure meeting space for WaterSense New Homes meetings as directed by the WACOR. If required, all conditions of section V.D (below) must be met before any related expenses occur. Meeting space shall include but is not limited to the rental of a room, audio-visual equipment, and sound equipment.

All appropriate clearances and approvals required by Agency policy in support of any and all conference related activities and expenses, including support of meetings, conferences, training events, award ceremonies and receptions, shall be obtained by the EPA WACOR and contract level COR as needed and provided to the Contracting Officer. Work under conference related activities and expenses shall not occur until this approval is obtained and provided to the CO. Conference related purchases are not expected to exceed \$20,000 under this contract. OWM will provide an executed EPA Form 5170. All additional costs must be approved by the Contracting Officer before they are incurred.

- b. Based on the recent momentum from ongoing collaborations with ENERGY STAR, Indoor airPLUS (IAP) and Habitat for Humanity Metro Denver, WaterSense would like to continue the targeted recruitment of other Habitat affiliates and other affordable housing builders, providers and agencies/stakeholders. The contractor will propose and then develop tools and materials to support the recruitment of affordable builders as well as recommendations for coordinating with Habitat for Humanity at the local, regional and national levels. These tools may include, but are not limited to: community tools, regional case studies, webinars, fact sheets, Q&As, blog or article templates etc. The contractor shall plan on developing no more than three (3) – five (5) tools under this section.

#### Subtask 2.6 – Update New Homes Content on the Public Website

The Contractor shall develop content for the WaterSense website as provided in technical direction from the WACOR. Web content development for updates will likely be needed to update the pages relating to new homes that are geared towards the consumer, builder/provider partners and other stakeholders that can't partner with WaterSense (i.e. inspectors and realtors.) The content is anticipated to consist of updates of current text on pages and the creation of entirely new pages. All web content shall comply with section 508

and other EPA's Office of External Affairs and Environmental Education (OEAE) guidelines. The Contractor shall develop text for approximately one (1) major, and possibly two (2) – three (3) minor web updates/postings of one (1) to two (2) web pages each throughout the period of performance.

### **Task 3: Outdoor Sector Support**

All activities listed in this task are contingent upon direction from the WACOR. The objective of this task is to provide support for the Outdoor Sector of the WaterSense program. This task involves: strategic planning for the outdoor sector (sub-task 3.1), support for the professional certification labeling program (sub-task 3.2), support for outreach on outdoor water-efficiency (sub-task 3.3), and conference travel (sub-task 3.4).

#### **Sub-Task 3.1: Strategic planning for the Outdoor sector**

The contractor shall support the development of a plan to guide the future direction of WaterSense's outdoor sector. In coordination with the WACOR, the contractor shall revisit the existing programmatic goals and identify any changes or additions needed. Then, the WACOR and contractor shall identify short and mid- term activities to achieve the goals. Planning should encompass all areas of the outdoor sector, including but not limited to, labeled product, programs and new homes support, professional certifications, and changing consumer perceptions. For planning purposes, the final plan should be no more than five (5) pages long.

#### **Sub-Task 3.2: Support for the Professional Certification Labeling Program**

The WaterSense program requires a set of competent professionals to install and promote WaterSense services and labeled products in the marketplace. At this time, the WaterSense has released a WaterSense Professional Certification Program Labeling System and three (3) specifications to label programs in the irrigation field. The Contractor shall provide support to review applications, support Professional Certifying Organization (PCO) partners, and administer the program. See below for details:

**a. Review applications for PCO approval and labeling programs:** The contractor shall develop protocols for the review of applications for PCO approval and to label a program. The Contractor shall process and review both types of applications according to these protocols. This shall include: answering questions from the applicant while they are preparing the application, acknowledging receipt of the application, reviewing the application based on the requirements outlined in the WaterSense Professional Certification Program Labeling System and appropriate specification, communicating with the applicant about any areas that need additional information, and providing a summary of the strengths and deficiencies of the application to the WACOR. The Contractor shall then submit this summary to the WACOR for approval or disapproval. Upon WACOR approval or disapproval of an application, the Contractor shall notify the applicant of the decision. The Contractor can expect four (4) – six (6) applications for PCO approval and six (6) – nine (9) applications to label programs. The Contractor shall keep the WACOR informed of all new applicants and the progress of the application review.

**b. PCO Partner Support:** The Contractor shall provide support to newly approved and existing PCO partners. This support shall include on-boarding newly approved PCOs. The

Contractor shall communicate with new PCO partners to properly acclimate these organizations to their newly acquired role. Communication shall include, but not be limited to, an explanation of proper label use, the WaterSense Partner Resource website and the relevant resources available, expectations for sending program information to certified professionals, the quarterly and annual reporting requirements, and soliciting feedback on support needed from WaterSense. For planning purposes, the Contractor can expect four (4) – six (6) new PCOs and six (6) – eight (8) new adopting PCOs. In addition, the contractor shall coordinate communication with the PCO partners including soliciting feedback on ways WaterSense can best provide partner support and the dissemination of WaterSense outdoor water use and irrigation information to all PCO partners on a regular basis. This may include such activities as educating PCOs about the outdoor requirements in the new homes specification, collecting feedback on campaign materials, encouraging participation in outdoor related campaigns, and coordinating to disseminate information to certified professionals.

**c. Implement Directory of Certified Professionals:** As specified in the WaterSense Professional Certification Program Labeling System, EPA will collect a list of certified professionals from each PCO quarterly and publish that list in consolidated directory of certified professionals. At the direction of the WACOR, the contractor shall populate the directory with data provided by PCO partners and launch the directory on the WaterSense public website. After the launch, the contractor shall update the data quarterly.

The contractor shall communicate with each PCO on quarterly basis to request the submittal of data. Once all quarterly data is submitted, the contractor shall then use the submitted data to update the directory. The contractor shall provide support to and answer questions from PCOs regarding data submittal. The contractor shall develop standard operating procedures for the collection of data from the PCO partners and the updating and publishing of data in the directory.

**d. Update materials that reference irrigation partners:** As directed by the WACOR, the Contractor shall update references to the irrigation partnership program in materials, including but not limited to, official guidance documents, specifications, program guidelines, web text on the partner and public websites, brochures, and other materials. For planning purposes, the Contractor shall plan to review and revise ten (10) separate documents. The Contractor shall draft changes to such documents and web text and provide changes to the WACOR for review. Upon receipt of proposed changes from the Contractor, the WACOR shall review and return proposed changes to the Contractor for incorporation. The Contractor shall make changes to applicable documents and return finalized versions to the WACOR. For updating web text, the Contractor shall submit the original web text in word document format with track changes to demonstrate the proposed changes. The Contractor shall send the word document with track changes to the WACOR.

**Sub-Task 3.3: Support for Outreach on Outdoor Water Efficiency**

**a. Outdoor Marketing and Outreach:** Addressing outdoor water use presents a substantial opportunity for water savings. Under this subtask, the Contractor shall develop three (3) – five (5) new materials and revise two (2) – four (4) existing materials to help WaterSense spread a

message of outdoor water efficiency. Developed messaging shall focus especially on WaterSense's top four (4) outdoor messages:

- (1) Use certified irrigation professionals
- (2) Design the landscape for water efficiency
- (3) Use the right amount of water in the landscape
- (4) Replace standard controllers with weather-based irrigation controllers.

Developed materials may include, but are not limited to: a campaign to encourage hiring certified professionals; materials to effectively promote WBICs; brochures on water-efficient landscaping; new content for the Smart Outdoor Practices section of the WaterSense website; adapting existing outdoor or irrigation content; messaging in the form of web banners and other items for WaterSense social media outlets to garner attention to WaterSense outdoor campaigns; and briefings, presentations, and other outdoor sector materials (e.g., graphics, briefing slides, talking points, fact sheets) for use within and outside of the Agency in consultation with EPA personnel.

For the development of new content or revision to existing content, the Contractor shall submit draft versions for EPA approval. The Contractor shall make EPA-approved revisions and provide final versions of the materials, incorporating any revisions. The Contractor shall make final versions of the materials available on the WaterSense Partner Resources website or WaterSense public website, as directed by the WACOR.

**b. Partner Event to Promote Labeled Controllers:** The contractor shall support the initial planning for a partner event to promote the use of labeled controllers to be held in spring 2015. The contractor shall identify options for the event, including potential partners to host and support the event, to the WACOR. The partner event may include direct outreach to consumers, training for irrigation professionals, or both. After the WACOR decides which option to pursue, the contractor shall coordinate planning the event, including but not limited to, supporting host and supporting partners communication, identifying materials needed, and identifying media and promotional opportunities.

#### Sub-Task 3.4: Conference Travel

For planning purposes, the Contractor shall assume one (1) four (4) -day trip will be required to support WaterSense activities related to irrigation professional certification and outdoor water efficiency outreach. The Contractor can expect to attend one Irrigation or Outdoor Conference, location and date TBD.

Based on the WaterSense's needs at the conference, the Contractor may be tasked with developing the following: technical session presentations, facilitate or attend technical sessions, and/or develop and disseminate conference specific promotional materials. Details of the extent of support will be provided by the EPA WACOR to the Contractor through written technical direction.

Following the conference, the Contractor shall prepare and submit to the EPA WACOR, a brief (two (2) – three (3) page) report summarizing relevant conference highlights. Based on the type

of support provided, the report should include such information as attendance at the WaterSense exhibit, types of questions asked by the attendees, feedback on WaterSense or WaterSense labeled products and services, names of WaterSense partners exhibiting, number of attendees and comments/questions at pertinent technical sessions, promising contacts, potential partners, and media questions/inquiries.

#### **IV. DELIVERABLES**

Documents prepared under this contract shall be provided in electronic format, compatible with the MS Office Suite. The Contractor shall be familiar with EPA's Office of External Affairs and Environmental Education (OEAAEE) guidelines, standards, best practices, technical requirements for web site design and publications and all deliverables shall comply with those requirements. All documents shall be provided first as drafts. EPA may provide comments for the Contractor to incorporate into the final documents. The final document format will be agreed upon by the EPA WACOR and the Contractor in advance. The Contractor shall also provide electronic copies of any data files developed in the course of this Work Assignment.

The Contractor shall discuss any disagreements with or questions on EPA-provided comments prior to submission of a final document. All deliverable revisions will be due back to the EPA WACOR no later than 15 calendar days after the Contractor receives EPA feedback unless otherwise specified by the WACOR. If EPA chooses not to provide comments, the draft document will be accepted as final, and the Contractor will be notified that no revisions are required.

<b>Task</b>	<b>Task Title</b>	<b>Subtask</b>	<b>Deliverable</b>	<b>Due Date</b>
<b>1</b>	Work Plan and Budget	1.1	Work Plan	Fifteen (15) calendar days after the contractor receives the work assignment.
		1.1	Monthly Progress Report	Monthly
		1.2	Conference calls with WACOR and TM	Bi-weekly or as needed
<b>2</b>	New Homes Partner Support			
	Sector Specific Market Research	2.1	Sector-Specific Market Research Report	Within three (3) weeks of WACOR direction
	Strategic Planning	2.2	Annual Outreach Work Plan for New Homes Partners	January 2015
	New Homes Materials & Partner Tools	2.3	New Homes Partner Toolkit Recommendations	Semiannually
		2.3 a	Draft Partner Tool/Revisions to Tools	Within three (3) weeks of WACOR direction
		2.3 a	Final Partner Tools	Within two (2) weeks of TM comments
		2.3 b	Draft Partner Support Materials	Within three (3) weeks of WACOR direction
		2.3 b	Final Partner Support Materials	Within two (2) weeks of TM/ WACOR comments
	New Homes Partner Webinars	2.4	Draft presentation	Within two (2) weeks of WACOR direction
		2.4	Final presentation	Within one (1) week of receipt of TM comments
	Recruitment & Support of Local Promotional Efforts	2.5	Develop Recruitment Rollout Plan	Within three (3) weeks of WACOR direction; to be completed by end of November 2014
		2.5 a,b	Draft Materials for call/webinar w/ interested stakeholders/partners	Within three (3) weeks of WACOR direction
		2.5 a,b	Finalize Materials for call/webinar w/ interested stakeholders/partners	Within two (2) weeks of TM comments
		2.5 b	Local Promotional efforts – strategy	Within three (3) weeks of WACOR direction; to be completed by end of November 2014
		2.5 b	Local Promotional efforts – implementation	As outlined in TM-approved strategy; to be completed by end of January 2015

		2.5 c	Affordable Housing Recruitment - strategy	Within three (3) weeks of WACOR direction; to be completed by November 2014
		2.5 c	Affordable Housing Recruitment – implementation	As outlined in TM-approved strategy; to be completed by the end of January 2015
		2.5 d	Draft materials for affordable housing recruitment	Within three (3) weeks of WACOR direction
		2.5 d	Finalize materials for affordable housing recruitment	Within two (2) weeks of TM comments
	Update New Homes Content on Public Website	2.6	Develop text for web updates/postings	Within two (2) weeks of WACOR direction
		2.6	Finalize text for web updates/postings	Within one (1) week of receipt of TM comments
<b>Task</b>	<b>Task Title</b>	<b>Subtask</b>	<b>Deliverable</b>	<b>Due Date</b>
<b>3</b>	Outdoor			
<b>3</b>	Strategic Planning	3.1	Draft strategic plan for the outdoor sector	Within three (3) weeks of communication from WACOR
		3.1	Final strategic plan for the outdoor sector	Within two (2) weeks of receipt of comments from WACOR
<b>3</b>	Professional Certification Labeling Program	3.2 a	Protocols for review of applications	Within two (2) weeks of direction from WACOR
		3.2 a	Summary report on application	Within three (3) weeks of receipt of application from potential PCO
		3.2 a	Follow-up with applicant	Within one (1) week of decision by WACOR
		3.2 b	Schedule call with newly labeled PCO	Within two (2) weeks of program labeling
		3.2 b	Send welcome materials to newly labeled PCO	Within one (1) week of program labeling
		3.2 c	Launch of directory of certified professionals	Within three (3) weeks of communication from WACOR
		3.2 c	Collect data and update directory	Quarterly
		3.2 c	Standard operating procedures for the directory	Within three (3) weeks of the launch of the directory
		3.2 d	Draft updates to materials that reference irrigation partners	Within two (2) weeks of communication from WACOR



		3.2 d	Final updates to materials that reference irrigation partners	Within two (2) weeks of receipt of comments from WACOR
3	Outreach on Outdoor Water Efficiency	3.3 a	Draft outdoor marketing and outreach materials	Within three (3) weeks of communication from WACOR
		3.3 a	Final outdoor marketing and outreach materials	Within two (2) weeks of receipt of comments from WACOR
		3.3 b	Summary of potential event and event hosts	Within three (3) week of communication with WACOR
3	Conference Travel	3.4	Attend conference	TBD
			Conference report	Within two (2) weeks of end of conference

## V. MISCELLANEOUS

### A. Software Applications and Accessibility:

Word processing files delivered to the Government shall be Microsoft Word, 8.0 or higher. All software and electronic information technology shall conform to the requirements relating to accessibility as detailed to the 1998 amendments to the Rehabilitation Act, particularly, but not limited to, § 1194.21 Software applications and operating systems and § 1194.22 Web-based intranet and internet information and applications. See: <http://www.section508.gov>.

- Preferred text format: MS Word, 8.0 or higher (MS Office 2003 or higher)
- Preferred presentation format: Power Point, Office 2003 or higher
- Preferred graphics format: Each graphic is an individual GIF file
- Preferred portable format: Adobe Acrobat, Version 6.0

### B. Travel.

Travel is expected for this work assignment. Any travel chargeable to this work assignment shall be allowable only in accordance with the limitation of FAR 31.205-43 and FAR 31.205-46, and must be approved by the EPA Contracting Officer Representative (COR) prior to travel taking place. The WACOR will provide at least a two week notice of any non-local travel. For planning purposes, the contractor shall assume one (1) to two (2), three (3) – four (4) day trips will be required over the course of this Work Assignment. Any specific travel proposed for completion of this work assignment must be approved in writing by the EPA contract level COR in advance.

### C. Release of Data and Information.

All information collected and developed under this Agreement is the property of the U.S. EPA and shall not be released to the public or used for other work or projects, including EPA or other federal work, without written authorization of the CO.

**D. Conference/Meeting Guidelines and Limitations:**

All appropriate clearances and approvals required by Agency policy in support of any and all conference related activities and expenses, including support of meetings, conferences, training events, award ceremonies and receptions, including the form 5170 for all meetings costing more than \$20,000, shall be obtained by the EPA Contract Level COR as needed and provided to the Contracting Officer (CO). Work under conference related activities and expenses shall not occur until this approval is obtained and provided by the EPA Contract Level COR. Conference expenses are all direct and indirect costs paid by the government and include any associated authorized travel and per diem expenses, room charges for official business, audiovisual use, light refreshments, registration fees, ground transportation and other expenses as defined by the Federal Travel Regulations. All outlays for conference preparation should be included, but the federal employee time for conference preparation should not be included. After notifying EPA of the potential to reach this threshold, the Contractor shall not proceed with the task(s) until authorized to do so by the Contracting Officer.

**E. Contractor identification**

Contractor personnel shall always identify themselves as Contractor employees by name and organization and physically display that information through an identification badge. Contractor personnel are prohibited from acting as the Agency's official representative.

The Contractor shall refer any questions relating to the interpretation of EPA policy, guidance, or regulation to the Work Assignment Contracting Officer Representative.

**F. Technical Direction**

The Contract level COR or an authorized individual is permitted to provide technical direction. Technical direction must be within the statement of work of the contract and includes: (1) Direction to the contractor which assists the contractor in accomplishing the Statement of Work, (2) Comments on and approval of reports or other deliverables. Technical direction will be issued in writing or confirmed in writing within five (5) calendar days after verbal issuance. One copy of the technical direction memorandum will be forwarded to the Contracting Officer and the Contract Level Contracting Officer Representative.

**G. Management Controls**

All printing shall be in accordance with clause H.2 (Printing) of the contract.

**VI. QUALITY ASSURANCE SURVEILLANCE PLAN**

All tasks are to be completed on or ahead of schedule unless EPA and the contractor mutually agree to a schedule change.

The contract level QASP applies to this work assignment. The requirements do include environmental measurements, etc., therefore a supplement programmatic quality assurance project plan (PQAPP) is required.

<b>EPA</b> United States Environmental Protection Agency Washington, DC 20460 <b>Work Assignment</b>						Work Assignment Number B-03				
						<input type="checkbox"/> Other <input checked="" type="checkbox"/> Amendment Number: 000001				
Contract Number EP-C-14-014			Contract Period 07/17/2014 To 02/13/2015 Base <input checked="" type="checkbox"/> Option Period Number			Title of Work Assignment/SF Site Name				
Contractor EASTERN RESEARCH GROUP, INC.					Specify Section and paragraph of Contract SOW					
Purpose: <input type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Close-Out <input checked="" type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Incremental Funding <input type="checkbox"/> Work Plan Approval						Period of Performance  From 08/14/2014 To 02/13/2015				
Comments: The purpose of this amendment is to change the Alt. WACOR to Amber Lefstead.										
<input type="checkbox"/> Superfund    Accounting and Appropriations Data <input checked="" type="checkbox"/> Non-Superfund										
Note: To report additional accounting and appropriations data use EPA Form 1900-69A.										
SFO (Max 2) <input type="checkbox"/>										
Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										
Authorized Work Assignment Ceiling										
Contract Period:		Cost/Fee:		LOE:						
07/17/2014 To 02/13/2015										
This Action:										
Total:										
Work Plan / Cost Estimate Approvals										
Contractor WP Dated:				Cost/Fee:			LOE:			
Cumulative Approved:				Cost/Fee:			LOE:			
Work Assignment Manager Name    Amber Lefstead  <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>							Branch/Mail Code: Phone Number    202-564-2906 FAX Number:			
Project Officer Name    Robin Danesi  <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>							Branch/Mail Code: Phone Number:    202-564-1846 FAX Number:			
Other Agency Official Name    Veronica Blette  <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>							Branch/Mail Code: Phone Number:    202-564-4094 FAX Number:			
Contracting Official Name    Sandra Stargardt-Licis  <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>							Branch/Mail Code: Phone Number:    513-487-2006 FAX Number:			

<b>EPA</b> United States Environmental Protection Agency Washington, DC 20460 <b>Work Assignment</b>						Work Assignment Number B-04				
						<input type="checkbox"/> Other <input type="checkbox"/> Amendment Number:				
Contract Number EP-C-14-014			Contract Period   07/18/2014   To   02/13/2015 Base <input checked="" type="checkbox"/> Option Period Number			Title of Work Assignment/SF Site Name WaterSense Web support				
Contractor EASTERN RESEARCH GROUP, INC.					Specify Section and paragraph of Contract SOW 3.3					
Purpose: <input checked="" type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Close-Out <input type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Incremental Funding <input type="checkbox"/> Work Plan Approval						Period of Performance  From   08/14/2014   To   02/13/2015				
Comments:										
<input type="checkbox"/> Superfund                      Accounting and Appropriations Data <input checked="" type="checkbox"/> Non-Superfund										
Note: To report additional accounting and appropriations data use EPA Form 1900-69A.										
SFO <input type="checkbox"/> (Max 2)										
Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										
Authorized Work Assignment Ceiling										
Contract Period:		Cost/Fee:				LOE: 0				
07/18/2014 To 02/13/2015										
This Action:						820				
Total:						820				
Work Plan / Cost Estimate Approvals										
Contractor WP Dated:				Cost/Fee:			LOE:			
Cumulative Approved:				Cost/Fee:			LOE:			
Work Assignment Manager Name    Jonah Schein							Branch/Mail Code:			
_____ (Signature)                      (Date)							Phone Number    202-564-2720			
							FAX Number:			
Project Officer Name    Robin Danesi							Branch/Mail Code:			
_____ (Signature)                      (Date)							Phone Number: 202-564-1846			
							FAX Number:			
Other Agency Official Name    Kathleen Rechenberg							Branch/Mail Code:			
_____ (Signature)                      (Date)							Phone Number: 513-487-2853			
							FAX Number:			
Contracting Official Name    Sandra Stargardt-Licis							Branch/Mail Code:			
_____ (Signature)                      (Date)							Phone Number: 513-487-2006			
							FAX Number:			

**PERFORMANCE WORK STATEMENT**  
**Technical Evaluation and Market Assessment Support for the Water Efficiency Program**  
**Contract No. EP-C-14-014**  
**Work Assignment No. B-04**

**I. ADMINISTRATIVE (PWS Area 3.2.4)**

**A. Title: WaterSense® Program General Web Support and Maintenance**

**B. Work Assignment Contracting Officer Representative:**

Jonah Schein  
US EPA (MC: 4204M)  
1200 Pennsylvania Ave., N.W.  
Washington, DC 20460  
(202) 564-8836, FAX: (202) 501-2396

**Alternate Work Assignment Contracting Officer Representative:**

Karen Wirth  
US EPA (MC: 4204M)  
1200 Pennsylvania Ave., N.W.  
Washington, DC 20460  
(202) 564-5246, FAX: (202) 501-2396

**C. Quality Assurance:**

The requirements of this work assignment do not include the collection of primary or secondary environmental data; therefore, a programmatic quality assurance project plan (PQAPP) is not required.

**Background:** WaterSense, an EPA partnership program, seeks to enhance the market for water-efficient products and practices. The program aims to provide information to residential and commercial/institutional consumers to help them select water-efficient products and adopt water-efficient practices; encourage manufacturers and service providers to increase the water-efficiency of their offerings; provide a turn-key approach to promoting water efficiency for local officials and organizations to use in their efforts; and inform the public about the importance of using water resources efficiently.

**II. OBJECTIVE:**

The objective of this work assignment is to provide support for website evaluation and ongoing maintenance updates for the WaterSense program. This work assignment applies to all websites maintained by WaterSense (currently these consist of the public

website and the password protected partner website). EPA seeks to continually improve the user experience and to more effectively communicate the WaterSense message through its program website. For each of the following tasks, EPA will make results of previous research and program development materials available to the Contractor as necessary. For all tasks, The Contractor shall provide all source files and content to EPA with final deliverables. In order for the Contractor to fulfill the requirements of the tasks specified in this work assignment, it will require information, reports, analysis, etc from other WAs under this contract; however, no work will be duplicated on any two WAs. The Contractor shall maintain comprehensive knowledge of EPA's Office of External Affairs and Environmental Education (OEAE) and Office of Environmental Information (OEI) guidelines, standards, best practices, and technical requirements for website design and publications as well as OEAE partnership program requirements. All deliverables shall comply with those requirements.

### **III. TASK DETAIL:**

The Contractor shall perform the following tasks:

#### **Task 0 - Work Plan and Budget Development**

The Contractor shall prepare a detailed work plan and budget for the accomplishment of the indicated tasks in accordance with the clause Work Assignments (EPAAR 1552.211-74). The work plan shall include a description of: (a) proposed staff; (b) an estimate of hours to be spent on each task by each staff person (prime and subcontractors); and (c) a list of deliverables, with due dates and schedule for deliverables. This task also includes monthly progress and financial reports which shall conform to the requirements particularized to the clause, F.3 MONTHLY PROGRESS REPORT (EPAAR 1552.210-72) (JUN 1996).

**Task 1 Maintain Accuracy and Timeliness of the WaterSense Website.** The WaterSense website will continue to be "the place to go" on EPA's website for information about water efficiency. The site shall include up to date information on the need for water efficiency and the related benefits, both environmental and economic as well as programmatic information related to campaigns, specifications, and program implementation. It will provide free, unbiased information and technical support on water efficiency. The Contractor shall provide support to EPA staff to ensure the timely updating of the WaterSense website.

**Task 1.1 Website Maintenance:** Maintaining the WaterSense website will require ongoing (daily) monitoring; frequent (weekly) changes, and updating of documents. The contractor shall perform maintenance at the intervals defined in Task 2 in order to ensure proper functioning of the site. Maintenance will include weekly review of the site's content for accuracy, scans for broken links, and other methods as determined in conjunction with the EPA WACOR.

**Task 1.2 Ensure the Accuracy of Site Content:** The Contractor shall ensure the accuracy of all data included on the WaterSense website on web pages as well as in PDFs and other posted files, by clearing the content with EPA WACOR prior to development. The Contractor shall also ensure, both on web pages and in posted files, the accuracy of all WaterSense program marks and the coherence of all website messaging vis-à-vis WaterSense guidance documents such as the Program Guidelines, Graphics Standards and Style Guide, and Label and Logo Use Guidelines.

**Task 1.3 Maintain Site:** The Contractor shall ensure that the site services current program needs, by effectively communicating information about the program to partners and to the public. Maintaining the WaterSense website will require frequent changes to existing pages, documents (such as PDFs), and sections as well as their creation. Web planning and development shall be done with anticipation that the list of 'likely visitors' will grow as the program grows. Strategies to accommodate the growth of the program should be presented to WACOR.

**Task 1.4 Provide Ongoing Technical Recommendations:** The Contractor shall make unsolicited recommendations aimed at improving the ease with which users access, navigate, and learn from the WaterSense website. The Contractor shall also make recommendations as to how best maintain the WaterSense website given anticipated changes to EPA web policy or hosting environment. Recommendations should not be implemented without approval from the EPA WACOR.

**Task 2 Follow Website Update Protocol.** Due to the frequent nature of programmatic developments and additional content needed to be posted to the WaterSense Web site, updates shall be scheduled by EPA at periodic intervals. Such updates can apply to any of the web sites maintained by WaterSense. For planning purposes, the Contractor shall anticipate two (2) updates each month. The Contractor will be notified of needed changes no later than five (5) days prior to the live posting date.

**Task 2.1 The Contractor Shall Maintain a List of Items and Files Required:** Review list (provided to the Contractor by EPA WACOR in excel format via email prior to the scheduled update) of necessary files, text, and web pages required for regular site updates. This information will be provided approximately five (5) days before the scheduled update. It will be the responsibility of the Contractor to alert EPA WACOR at least four (4) days prior to the scheduled update regarding missing elements (files, links, or pages) critical to the functioning of the website.

**Task 2.2 The Contractor Shall Perform Regular Updates:** As a partnership program, WaterSense requires that certain items receive regularly scheduled updates. Updates will consist of the edits and changes contained in the update list provided to the Contractor in task 2.1. More in depth updates will also occur on

periodic basis. In the event of larger updates, EPA WACOR will work in conjunction with the Contractor to ensure that adequate notice is given. For planning purposes, The Contractor shall assume 4-8 new pages will need to be either posted, updated or removed from the site completely during each update.

**Task 2.3 The Contractor Shall Adhere to Update Review Process:** The Update Review Process shall consist of three steps, and EPA WACOR may request edits to the update at any time. In Step 1, the EPA WACOR will provide to the Contractor, a list in excel format via email of anticipated updates five (5) days prior to the scheduled update and The Contractor shall maintain list of items and files. Step 2, upon receipt of the list in Task 2.1, the Contractor shall post the proposed update materials in EPA's test environment. Step 3, after the materials in the test environment have been approved by EPA WACOR, The Contractor shall post the materials for public access on the EPA server. In the event that the EPA server environment should change (for instance the launch of a content management system replacing EPA's current UNIX servers), then the comparable password protected environment and public environments will take the place of the test and public directories respectively.

**Task 2.4 The Contractor Shall Perform Additional Updates as Needed:** From time to time, EPA will require updates to be rescheduled, added, or eliminated based on pressing and time sensitive program developments. Such incidents will occur at the discretion of the EPA WACOR. In such cases, EPA WACOR will alert the Contractor to these needs no later than one business day prior to the update. Contractor should expect such updates to occur two (2) times per quarter.

**TASK 3: Configure and Produce Code to Connect the WaterSense Website with the WaterSense CRM Data.** The Contractor shall configure and maintain the WaterSense Customer Relationship Management software (SalesForce) to directly feed the WaterSense website information regarding WaterSense labeled products, partners, and additional information stored in SalesForce. SalesForce data (and other sources as deemed necessary by the EPA WACOR) shall continue to be maintained such that its contents can be dynamically queried by the WaterSense website and accessed utilizing AJAX and JavaScript techniques, allowing for the creation of dynamic and searchable pages without the need for flash plug-ins or maintenance of additional databases. The Contractor shall configure additional information entered into SalesForce such that it is also accessible in this manner as additional product and partner categories are added to the program. Information shall be accessible on the WaterSense website regardless of hosting environment.

**Task 3.1: The Contractor shall configure SalesForce output:** The Contractor shall be responsible for maintaining the SalesForce output (and output for additional sources) configuration and ensuring the appropriate data is accessible on the WaterSense website. The available data fields will be governed by information currently stored in SalesForce and/or the source data.



**Task 3.2: The Contractor shall configure Salesforce output to support additional functionality:** The Contractor shall be responsible both for incorporating new product data into the Salesforce output and ensuring the appropriate data is accessible on the WaterSense website as well as adding fields required to support greater search functionality. For planning purposes, Contractor should assume 1 new product categories per year, and one additional feature or other change per quarter. The Contractor shall have information on new product categories prepared 20 days after receipt of the first labeled products in said category.

**Task 3.3: Develop and record standard operating procedures for managing Salesforce Output and making it available on the website:** The Contractor shall produce standard operating procedures for this process. These procedures will serve as a reference for recreating a comparable level of accessibility and functionality should changes occur on either side of the flow of information (i.e. should changes occur in the CRM or should they occur on EPA's website and technical stack).

**Task 4 Provide Web Statistics and Analytics.** The Contractor shall provide relevant information to EPA regarding the traffic and use of resources on the WaterSense website. In order to gain reliable feedback on the performance of the website, EPA requires regular data on website usage. The Contractor shall provide EPA with monthly statistics regarding website traffic, resources accessed, and other activity on a monthly basis. Monthly reports do not need to include a written analysis or recommendations. Reports should be conveyed using the standard WebTrends format. If needed, and only after approval from the EPA WACOR, the Contractor can change from WebTrends to an alternate application (such as Quick Tracks) if such a change would provide additional efficiency or information.

**Task 4.1: Prepare a report summarizing web statistics on the WaterSense website since its inception:** The Contractor shall produce a report summarizing the statistics and analytics on the WaterSense website since it first went online. EPA will make available to the contractor all necessary data points and log files for this purpose. The report shall focus on common themes in frequently accessed resources, degrees of responsiveness (in terms of traffic) to other internal and external factors, and recommendations for best management practices moving forward.

**Task 5 Comply with and Monitor EPA Web Requirements.** The WaterSense website needs to conform to all applicable EPA standards, requirements, and policies.

**Task 5.1 Comply with EPA Web Guide:** The Contractor shall maintain compliance of the WaterSense website with regard to the EPA Web Guide and inform EPA staff of important aspects of the Guide as they are encountered in the course of web maintenance and development as soon as they are encountered. The Contractor shall also inform EPA when notable changes occur in the Guide

when web postings are likely to be affected by said changes a minimum of ten (10) business days before the affected posting.

**Task 5.2 Ensure Security Standards on EPA Servers:** The Contractor shall conform to all security measures related to directly accessing EPA's Web servers as defined by EPA's web guide. Doing so includes promptly resetting server access (TSSMS) passwords prior to their expiration every ninety (90) days. In addition, The Contractor shall take steps to ensure that, in the event of circumstances beyond the Contractor's control, such as power outages or natural disasters, back-up systems are available to safeguard the Contractor's ability to access EPA servers. The Contractor shall provide these steps to EPA WACOR. In the event of back-up system failure, The Contractor shall be prepared to work, under technical direction provided by the WACOR, with IT staff at EPA to maintain the accessibility of the program website.

**Task 5.3 Monitor Developments in EPA Web Policy:** The Contractor shall monitor, with the assistance of EPA staff, the progress of any and all initiatives within the Office of Water, Office of Environmental Information and the Office of External Affairs and Environmental Education as well as other offices aimed at making changes to the technical requirements related to the maintenance of an EPA website. Such requirements may include but are not limited to content management systems (CMS), cascading style sheets (CSS), and special guidelines developed for use by partnership programs only. Accordingly, the Contractor shall take all such initiatives into account when maintaining the existing website or making plans for future development. The Contractor shall notify the WACOR in writing of any such changes likely to impact the WaterSense site within fifteen (15) business days.

**Task 6 Work Assignment Management.**

The Contractor shall meet with the WACOR and/or the Alternate WACOR either in person or via telephone as needed. For planning purposes Contractor should assume that such meeting will consume approximately two (2) hours per month. The Contractor shall provide a status update for tasks via email two days before each meeting. The Contractor shall meet with the WACOR on specific issues related to proper functioning of the site and the servicing of the audiences' needs more frequently as directed by the WACOR. Contractor should plan on one such meeting per quarter.

**IV. DELIVERABLE SCHEDULE:**

Task	Subtask	Deliverable	Due Date
0		Work plan	15 calendar days after the Contractor receives the work assignment.
1	1.1	Website Maintenance	Ongoing

	1.2	Ensure the Accuracy of Site Content	Ongoing
	1.3	Maintain and Expand Site	Ongoing
	1.4	Ongoing Technical Recommendations	Ongoing
<b>2</b>	2.1	Maintain List of Items and Files Required	Immediately upon receipt of update list
	2.2	Perform Regular Website Updates	5 days after receipt of update list
	2.3	Adhere to Update Review Process	5 days after receipt of update list
	2.4	Perform Additional Updates as Needed	1 day after receipt of comments from WACOR
<b>3</b>	3.1	Connect WaterSense CRM to Public Site	Ongoing
	3.3	Develop SOP for Salesforce Output	End of period of performance
<b>4</b>		Provide Monthly Website Statistics	Within 10 days of the end of the month
	4.1	Provide a report summarizing website activity	End of period of performance
<b>5</b>	5.1	Comply with EPA Web Guide	Ongoing
	5.2	Ensure Security Standards on EPA Servers	Ongoing
	5.3	Monitor Developments in EPA Web Policy	Ongoing
<b>6</b>		Work Assignment Management	Bi-monthly

Documents prepared under this contract shall be provided in electronic format, compatible with the MS Office Suite. All documents shall be provided first as drafts. EPA may provide comments for the Contractor to incorporate into the final documents. The final document format will be agreed upon by the EPA WACOR and the Contractor in advance. The Contractor shall also provide electronic copies of any data files developed in the course of this Work Assignment.

The Contractor shall discuss any disagreements with or questions on EPA-provided comments prior to submission of a final document. All deliverable revisions will be due back to the EPA WACOR no later than 15 days after the Contractor receives EPA feedback unless otherwise specified by the WACOR. If EPA chooses not to provide comments, the draft document will be accepted as final, and the Contractor will be notified that no revisions are required.

## **V. MISCELLANEOUS**

### **A. Software Applications and Accessibility.**

Word processing files delivered to the Government shall be Microsoft Word, 8.0 or higher. All software and electronic information technology shall conform to the requirements relating to accessibility as detailed to the 1998 amendments to the Rehabilitation Act, particularly, but not limited to, § 1194.21 Software applications and operating systems and § 1194.22 Web-based intranet and internet information and applications. See: <http://www.section508.gov>.

- Preferred text format: MS Word, 8.0 or higher (MS Office 2007 or higher)
- Preferred presentation format: Power Point, Office 2007 or higher
- Preferred graphics format: Each graphic is an individual GIF file
- Preferred portable format: Adobe Acrobat, Version 8.0

## **B. Travel.**

Travel will not be required in completion of this work assignment.

## **C. Release of Data and Information.**

All information collected and developed under this Agreement is the property of the U.S. EPA and shall not be released to the public or used for other work or projects, including EPA or other federal work, without written authorization of the CO.

## **D. Conference/Meeting Guidelines and Limitations:**

All appropriate clearances and approvals required by Agency policy in support of any and all conference related activities and expenses, including support of meetings, conferences, training events, award ceremonies and receptions, including the form 5170 for all meetings costing more than \$20,000, shall be obtained by the EPA Contract Level COR as needed and provided to the Contracting Officer (CO). Work under conference related activities and expenses shall not occur until this approval is obtained and provided by the EPA Contract Level COR. Conference expenses are all direct and indirect costs paid by the government and include any associated authorized travel and per diem expenses, room charges for official business, audiovisual use, light refreshments, registration fees, ground transportation and other expenses as defined by the Federal Travel Regulations. All outlays for conference preparation should be included, but the federal employee time for conference preparation should not be included. After notifying EPA of the potential to reach this threshold, the Contractor shall not proceed with the task(s) until authorized to do so by the Contracting Officer.

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The Contractor shall refer any questions relating to the interpretation of EPA policy, guidance, or regulation to the Work Assignment Contracting Officer Representative.

## **F. Technical Direction**

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## **G. Management Controls**

All printing shall be in accordance with clause H.2 (Printing) of the contract.

<b>EPA</b> United States Environmental Protection Agency Washington, DC 20460 <b>Work Assignment</b>						Work Assignment Number B-05				
						<input type="checkbox"/> Other <input type="checkbox"/> Amendment Number:				
Contract Number EP-C-14-014			Contract Period   07/18/2014   To   02/13/2015 Base <input checked="" type="checkbox"/> Option Period Number			Title of Work Assignment/SF Site Name				
Contractor EASTERN RESEARCH GROUP, INC.					Specify Section and paragraph of Contract SOW					
Purpose: <input checked="" type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Close-Out <input type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Incremental Funding <input type="checkbox"/> Work Plan Approval						Period of Performance  From   08/12/2014   To   02/13/2015				
Comments:										
<div style="display: flex; justify-content: space-between;"> <input type="checkbox"/> Superfund         <span>Accounting and Appropriations Data</span> <input checked="" type="checkbox"/> Non-Superfund       </div>										
Note: To report additional accounting and appropriations data use EPA Form 1900-69A.										
SFO (Max 2) <input type="checkbox"/>										
Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										
Authorized Work Assignment Ceiling										
Contract Period:		Cost/Fee:				LOE: 0				
07/18/2014 To 02/13/2015										
This Action:						6,720				
Total:						6,720				
Work Plan / Cost Estimate Approvals										
Contractor WP Dated:				Cost/Fee:		LOE:				
Cumulative Approved:				Cost/Fee:		LOE:				
Work Assignment Manager Name   Stephanie Tanner  <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>						Branch/Mail Code: Phone Number   202-564-2660 FAX Number:				
Project Officer Name   Robin Danesi  <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>						Branch/Mail Code: Phone Number: 202-564-1846 FAX Number:				
Other Agency Official Name   Kathleen Rechenberg  <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>						Branch/Mail Code: Phone Number: 513-487-2853 FAX Number:				
Contracting Official Name   Sandra Stargardt-Licis  <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>						Branch/Mail Code: Phone Number: 513-487-2006 FAX Number:				

## **PERFORMANCE WORK STATEMENT**

**Contract # EP-C-14-014**

**Work Assignment No. B-05**

### **I. ADMINISTRATIVE**

**A. Title: WaterSense® Product Development and Technical Support**

**B. Period of Performance: Issuance -2/13/15**

**C. Work Assignment Contracting Officer Representative**

<b>Work Assignment COR.</b> <b>Stephanie Tanner</b> <b>1200 Pennsylvania Ave, NW</b> <b>MC 4204-M</b> <b>Washington, DC 20460</b> <b>202-564-2660 Phone</b> <b>202-501-2396 Fax</b>	<b>Alternate WACORWACOR</b> <b>Jonah Schein</b> <b>1200 Pennsylvania Ave, NW</b> <b>MC 4204-M</b> <b>Washington, DC 20460</b> <b>202-564-2720 Phone</b> <b>202-501-2396 Fax</b>
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### **D. Quality Assurance**

The requirements do include environmental measurements, etc., therefore a supplement programmatic quality assurance project plan (PQAPP) is required. The Contractor shall create one PQAPP for data and information collected under both WA B-01 and WA B-05. This PQAPP will be acceptable to meet the requirements under this WA.

### **E. Background**

The WaterSense program is a voluntary partnership program to enhance the market for water-efficient products and practices. The program seeks to provide information to residential and commercial consumers to help them select water-efficient products and adopt water-efficient practices; encourage manufacturers and service providers to increase the water-efficiency of their offerings; provide a turn-key approach to promoting water efficiency for local officials and organizations to use in their efforts; and inform the public about the importance of using water resources efficiently.

**F.** The level of effort estimated for this work assignment is 6720 hours.

## **II. OBJECTIVE**

The objective of this work assignment is to obtain technical support in the evaluation of water-using products, systems, services and activities for their potential inclusion in the WaterSense program. EPA requires an in-depth understanding of both the technology, system or service and the market place in order to make decisions about market enhancement. This work assignment will provide research on products and services, development of specifications, conformity assessment and assistance with technical outreach to stakeholders.

For each of the following tasks EPA will make results of previous research and program development materials available as necessary. For all tasks, the contractor shall provide all source files and content to EPA with final deliverables. For each of the following tasks the contractor shall be responsible for coordinating certain activities with other EPA offices or other organizations outside of the EPA. In any communication with other EPA offices or organizations outside of EPA, the contractor must be certain to communicate that they are working as a contractor to the EPA's Office of Water (see section V. E). The contractor must be familiar with EPA's Office of Public Affairs guidelines, standards, best practices, technical requirements for Web site design and publications and all deliverables should comply with those requirements.

### **III. TASK DETAILS**

The contractor shall perform the following tasks:

#### **Task 1 - Work Plan, Program Planning, Funds Tracking and Management**

*Task 1.1 Work Plan* – The contractor shall prepare a detailed work plan and budget for the accomplishment of the indicated tasks in accordance with the clause Work Assignments (EPAAR 1552.211-74). The work plan shall include a description of: (a) proposed staff; (b) an estimate of hours to be spent on each task by each staff person (prime and subcontractors); and (c) a list of deliverables, with due dates and schedule for deliverables.

*Task 1.2 Funds Tracking and Management* – This task also includes monthly progress and financial reports which shall conform to the requirements particularized to the clause, F.3 MONTHLY PROGRESS REPORT (EPAAR 1552.210-72) (JUN 1996). The budget for this work assignment shall be tracked at the task level. The contractor shall meet with the WACOR and/or the Alternate WACOR either in person or via telephone approximately two (2) hours per month to discuss work assignment planning issues. The contractor shall meet with the WACOR on specific issues more frequently as directed by the WACOR for a maximum of twelve (12) times. The contractor shall also maintain a milestone chart or other tracking system for projects underway as part of this WA.

*Task 1.3 Program Planning* – The contractor shall assist the WaterSense program in developing a five (5) year plan for the technical program. The task will include organizing meetings with 10-15 stakeholders to obtain feedback on program successes and future direction. The contractor shall develop meeting agendas, summarize findings and work with EPA to refine feedback into a plan that may include a framework for screening projects, goals for products, systems and services and other activities to be undertaken by the program. The technical plan should complement the overall program plan, goals and objectives.

#### **Task 2 – Product Screening and Research**



Under this task the contractor shall conduct research on products and services for inclusion in the WaterSense program. This research will be the basis for determining if development of a specification is necessary under Task 3. Under this task area the contractor shall complete the preliminary screenings and detailed assessments described below. For each product or service, a draft and final report shall be completed.

*Task 2.1 Product Screening and Pipeline Management* – The contractor shall update and maintain the WaterSense product screening tool. The product screening tool is a spreadsheet used by the WaterSense program to prioritize products for detailed research and possible specification development. The contractor shall collect information on new water efficient products for consideration by the WaterSense program. New products can be identified from a number of sources including, but not limited to, conferences, trade shows, helpline inquiries, and technology magazines. On an annual basis the contractor shall update the tools to ensure that product information is current. The screening shall look at the overall technical and market situation of products and be based on easily available information including, water use, water saving, payback periods, national sales figures, status of standards and testing protocols. The contractor shall meet with the WACOR to review the revised tool and discussion new program priorities. This meeting should be held within one (1) month of the tool revision. The contractor shall expect to update the screening tool once as part of this work assignment. At the conclusion of the performance period, the contractor shall prepare a final annotated version of any documents or tools for delivery to the WACOR. The annotated version shall include any information necessary to continue use of the materials after the contract has ended including but not limited to citation of data sources and an explanation of calculations and terms.

*Task 2.2 Technical Assessments and Market Research Report* – The contractor shall complete research that provides a broad understanding of identified product categories and specific products. This information should build on information gathered during the preliminary screening. Information developed at this level should inform the specification development and conformance assessment process. This assessment shall be used to determine which products will actually be included in the WaterSense program and what the appropriate market mechanism will be. This phase of the research should conclude with a research report for the program. The research should cover the topics outlined in the WaterSense Specification Development Guidelines (Guidelines).<sup>1</sup>

The contractor shall complete one (1) draft report and one (1) final report as part of this work assignment. The contractor shall attend and participate in 4-5 meetings taking place locally or via conference call or webinar. The EPA WACOR will give the contractor at least a two (2) week notice of expected meeting dates and times.

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<sup>1</sup> ERG is already in possession of the Specification Development Guidelines

### **Task 3 - Product Development and Management**

The EPA has selected a number of products for further development based on work completed under Contract EP-C-09-008. The contractor shall work with EPA to engage a broad spectrum of stakeholders including: (non-government organizations) NGOs, trade and professional associations, products manufactures, service providers, conformance assessment bodies, standard setting bodies and utilities. Input from stakeholders can be obtained from a range of mechanisms from simple conference calls to formal meetings, as appropriate. The contractor shall have a system in place for tracking and managing input from stakeholders and the general public. This process is highly dependent on the industry and complexity of the technology, but should follow the instructions outlined in the Guidelines. Detailed information on the development of the documents in this section is included in the Guidelines. The contractor should also develop tracking material for each task as necessary. The contractor may need to attend non-local meetings with relevant stakeholders for information gathering purposes as part of this task. The contractor can expect to attend 1-2 meetings of 1-2 days each as part of this task. The WACOR will provide at least a two (2) weeks notice of any meeting. These meetings will take place via webinar or at another industry event so that contractor will not need to rent or locate space for the meetings. At the conclusion of the performance period, the contractor shall prepare a final annotated version of any documents or tools for delivery to the WACOR. The annotated version shall include any information necessary to continue use of the materials after the contract has ended including but not limited to citation of data sources and an explanation of calculations and terms.

*Task 3.1 Notice of Intent (NOI)*— This is the process by which WaterSense formally declares its intent with respect to products. Where an NOI was issued under a prior work assignment, the contractor shall continue the NOI process for this product. The main objective of this process is to engage the stakeholder community and obtain information needed to fully develop a specification or other WaterSense output document. The contractor can expect to work on two (2) NOI as part of this WA. It is also possible that one (1) of these products may not be completed due to technical issues; in that event the WACOR will inform the contractor on a replacement product or task consistent with this WA.

*Task 3.2 Draft Specifications* – Once WaterSense has answered the outstanding questions in the NOI, the specification development process can begin. When directed by the WACOR, the contractor shall develop the draft specification in accordance with the Guidelines and based on information developed during the research and NOI phases. This process shall require the contractor to coordinate up to three (3) public meetings of 2-3 hours, as appropriate to handle comments from the stakeholder community. These meetings will take place via webinar or at another industry event so that contractor will not need to rent or locate space for the meetings. In addition the contractor shall prepare the

Supporting Statement which summarizes the intent of the specification, research and cost effectiveness of the proposed specification and other documents as described in the Guidelines. The contractor can expect to complete up to three (3) Draft Specifications for products as part of this work assignment.

- a. *Flushometer valve toilets* – Under EP-C-09-008 WA4-05 and 5-05, the contractor began developing a draft specification for Flushometer valve toilets. The contractor shall complete development of the draft materials, host the public meeting for this product, collect and summarize written comments and those received from the public meeting and continue to work with the ASME<sup>2</sup> and other relevant organizations to finalize the test method and specification for this product.
- b. *Irrigation Devices* – At the direction of the WACOR the contractor shall begin developing a draft specification for outdoor irrigation devices where sufficient information was gathered under task 3.1 above. The contractor shall work with any relevant industry or standard development organization as directed on these products. The contractor can expect to complete 1-2 draft specifications under this work assignment.

*Task 3.3 Final Specifications* – At the conclusion of the draft specification comment period the contractor shall begin development of a final specification. The contractor shall develop the final specification in accordance with the Guidelines and based on additional information gathered or any further research identified during the comment period. This process shall generally include review and adjudication of all comments received, development of a plan for and conducting any further research needed to complete the specification. The contractor can expect to complete up to one (1) Final Specification for products as part of this work assignment.

*Task 3.4 Technology Assessment Guide* – If WaterSense determines that a specification is not appropriate for a product, then the contractor shall develop a Technology Assessment Guide for use by Water efficiency practitioner. The Guide shall be a useful summary of the research obtained and provide information to building managers and utilities on appropriate uses of the technology, installation guidance as appropriate and cost effectiveness information. The contractor can expect to complete one (1) Technology Assessment guide as part of this work assignment.

*Task 3.5 Specification Updates* – Due to technological changes in existing standards and other market factors some minor adjustment to the language of a number of existing specifications needs to be made. The contractor shall work with manufacturers, utilities and other stakeholders to update the existing specifications as determined by the WACOR. Where appropriate the contractor

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<sup>2</sup> A voluntary consensus based plumbing standards committee composed of manufacturers, utilities, NGO and local governments. We participate in accordance with the NTTAA and OMB circular A-119. They set standards for all plumbing products sold in the U.S. ASME (formerly American Society of Mechanical Engineers) no longer uses the longer title and now goes by its acronym.

shall also work with the ASME standards committees and DOE on adjustments to the language. The contractor can expect to update the specifications listed for showerheads and possibly 2-3 others, which may require up to two (2) meetings each via webinar.

*Task 3.6 Standards Development Committee Participation* – The contractor shall continue to participate standards committees relevant to WaterSense specification or activities. In this capacity, the contractor shall work with the committee to develop a schedule for developing specifications, coordinate with committee members, analyze data relevant to WaterSense, and review materials developed by the committee. Standards Committee may include:

- ASME/CSA (Canadian Standards Association) Joint Harmonization Task Group or other committees for plumbing fixtures and fittings as needed by specification development and management tasks.
- Member of the ASABE committee on landscape irrigation emission devices and committee on smart irrigation controllers

As part of this work assignment it is expected that the contractor will participate in product standard setting committees for up to three (3) products. The contractor shall participate in 3-5 total meetings in person or via conference call or webinar. The EPA WACOR will give the contractor at least a 2 week notice of expected meeting dates and times. Many of these meetings can be combined with meetings identified in other sub tasks at the direction of the WACOR.

#### **Task 4 - Product Certification**

In order to ensure that products and services bearing the WaterSense label meet the specification criteria, WaterSense requires third party certification of products. To support this process WaterSense has developed and published the WaterSense Product Certification System. The system provides a rigorous protocol for determining directly or indirectly that relevant requirements in WaterSense specifications are fulfilled.

*Task 4.1 Certification Scheme Management*– The contractor shall maintain and revise as necessary the controlling documents for the Certification Scheme including, licensing agreements, ad hoc guidance to accreditation organizations and certification bodies, Product Notification Templates and the website. The contractor can expect to maintain up to twenty (20) certification documents as part of this work assignment.

*Task 4.2 Certification Audit* – The contractor shall continue the audit of the certifications system begun under EP-C-09-008 WA 5-05, by developing a report summarizing the finding of that audit. The contractor shall then develop a plan for further auditing the certification program based on the findings in the first audit report. This audit will include up to six (6) Licensed Certification Bodies (LCB) and 2-3 products categories. The contractor shall work with the selected LCBs,

collected and review the necessary information and prepare a report summarizing the findings. The contractor shall make recommendation for changes to procedures or additional training necessary to correct any deficiencies found in the audit.

### **Task 5 - Technical Product Support**

The objective of this task is to support products launched under the WaterSense program. Items identified here are potential areas for support; actual activities under this task will be based on the needs of the WaterSense program as they develop. The contractor may need to attend non-local meetings with relevant stakeholders for information gathering purposes as part of this task. The contractor can expect to attend 1-2 meetings of 1-2 days each as part of this task. The WACOR will provide at least a two week notice of any meeting. These meetings will take place via webinar or at another industry event so that contractor will not need to rent or locate space for the meetings. Possible areas of support include:

*Task 5.1 Green buildings* – EPA is working with a number of organizations to include water efficiency in the requirements for high-performing new and existing buildings. The contractor shall provide support such as reviewing other green building standards and codes as needed to this effort. The contractor can expect up to five (5) requests for support throughout the year.

*Task 5.2 Marketing and technical outreach* – the contractor's technical team staff will coordinate with marketing team staff to ensure that outreach material and activities correctly reflect the technical aspects of the program. This can include media information requests, web content, presentations and conference papers. The contractor may also be required to attend conferences, tradeshow or other meetings to educate stakeholders on WaterSense. The contractor can expect up to five (5) requests for support throughout the year.

*Task 5.3 Miscellaneous technical support* – From time to time questions from stakeholders arise about WaterSense products, other water efficiency products and services and other technical issues. The contractor can expect up to ten (10) requests for support to answer questions throughout the period of performance. The contractor and the WACOR shall agree on an appropriate response time based on the complexity of the support required.

*Task 5.4 Energy Star Program Coordination* – The contractor shall work as needed with Energy Star to develop water criteria for energy and water using products. Activities may include, attending stakeholder workshops, review of products reports and proposed criteria and developing recommendations for new water efficiency criteria. The contractor can expect 2-4 requests for support throughout the year. It is expected that attending the workshops will not require any non-local travel on the part of the contractor.

*Task 5.5 Life-cycle Analysis* – The contractor shall perform life-cycle analyses on potential WaterSense products. The analysis shall conform to either ISO 14040 series and/or ASTM D7075 standards, as appropriate. The contractor can expect up to two (2) requests for support throughout the period of performance of this work assignment.

*Task 5.6 Metrics and Modeling* – The contractor shall continue to maintain and update the factoid catalog developed under EP-C-09-008 WA 4-05. Support for this task shall include addition of new facts as directed by the WACOR and revision of the data set with new price or water metric data if available. The contractor may expect development of 5-6 new facts for the catalog during the performance period.

### **Task 6 – New Homes Specification and Certification System Management**

For this task, the Task Manager is Jonah Schein, a member of the WaterSense team. A task manager will be the primary technical contact for the specified task and participate in technical communication with the contractor. However, any technical direction will still come from the EPA WACOR.

The objective of this task is to support the New Homes Program launched under the WaterSense program. Items identified here are potential areas for support; actual activities under this task will be based on the needs of the WaterSense New Homes program as it develops. At the conclusion of the performance period, the contractor shall prepare a final annotated version of any documents or tools for delivery to the WACOR. The annotated version shall include any information necessary to continue use of the materials after the contract has ended including but not limited to citation of data sources and an explanation of calculations and terms. Possible areas of support include:

*Task 6.1 New Homes Specification Management* – From time to time questions from stakeholders arise about WaterSense specifications, other water efficiency products and services and other technical issues. Occasionally, these will result in the need for modifications or clarifications to the New Homes Specification documents. The contractor can expect up to twenty (20) requests for support to answer questions and 1-2 modifications/clarifications to the specification documents throughout the work assignment period of performance. The contractor and the WACOR shall agree on an appropriate response time based on the complexity of the support required. The contractor will also compile a summary of these activities prior to the end of the work assignment period of performance.

*Task 6.2 New Homes Certification System* – To ensure that new homes bearing the WaterSense label meet the specification criteria; WaterSense requires third party certification of homes. To support this process WaterSense has developed and published the WaterSense New Homes Certification System. The system



provides a rigorous protocol for determining directly or indirectly that relevant requirements in WaterSense specifications are fulfilled.

- a. Certification System Document – The contractor shall maintain and revise as necessary the controlling documents for the Certification system including, licensing agreements, ad hoc guidance to administrators, Certification providers and auditors. The contractor can expect to maintain up to twenty-five (25) certification documents as part of this work assignment.
- b. Periodic Reports – The contractor shall review and analyze Certification Provider Quarterly reporters and Builder annual reports for use by EPA in managing the system and informing future decisions. Based on information in the reports and guidance from the WACOR the contractor shall prepare a recommendation for any changes to the Certification system needed to improve management of the program. The contractor shall also prepare a summary of issues identified by the helpline or other stakeholders to provide to Program administrators as part of their assessment process.
- c. Training – The contractor shall provide training as necessary to Certification Program Administrators and providers on the new homes certification systems. They shall use the presentations and other materials developed under the Work Assignment 3-05, 4-05, and 5-05 of EP-C-09-008.

*Task 6.3 New Home Builder Resource Manual & Training Materials*– The contractor shall maintain the timeliness and accuracy of the Builder Resource Manual completed under WA 1-02, EP-C-09-008 as well as supplemental training materials.

- a. Builder Resource Manual – The manual shall be updated to reflect any changes made to the New Homes specification under task 6.2 or 6.3. The contractor shall receive technical direction from the WACOR when changes are deemed substantial enough to warrant updating the resource manual and the contractor and WACOR shall agree on appropriate response time in these instances.
- c. Training Materials – The contractor shall prepare additional technical training materials to support the adoption of WaterSense Labeled Homes and water-efficient building practices throughout the residential construction industry. The contractor shall receive technical direction from the WACOR when such materials become necessary. The contractor shall also identify opportunities to educate builders and associated trade professionals at existing forums and venues where the target audience is known to attend. The contractor and WACOR will agree

on appropriate venues as well as appropriate deadline for the related material.

### **Task 7 – Commercial and Institutional Sector Outreach**

The WaterSense Program will provide information and guidance to the CI sector on water efficiency and management. For this task, the Task Manager is Tara O'Hare, a member of the WaterSense team. A task manager will be the primary technical contact for the specified task and participate in technical communication with the contractor. However, any technical direction will still come from the EPA WACOR. At the conclusion of the performance period, the contractor shall prepare a final annotated version of any documents or tools for delivery to the WACOR. The annotated version shall include any information necessary to continue use of the materials after the contract has ended including but not limited to citation of data sources and an explanation of calculations and terms. In order to support this, the Contractor shall complete the following tasks:

*Task 7.1 General CI Materials* – The Contractor shall revise and modify existing materials on water efficiency in the CI sector for use in association with the WaterSense program. Specifically the contractor shall continue to implement the WaterSense H2Otel Challenge that was developed and launched under WA 4-05 and 5-05. The H2Otel Challenge will be the main CI outreach priority during the period of performance including the wrap up of 2014 activities and the continuation of a Challenge in 2015 (may include additional facility types beyond hotels). All existing materials will be provided by the WACOR. The Contractor shall also develop new materials to assist specific stakeholders such as building owners, architect and engineering firms, and facility managers implement water efficiency in hospitality facilities and other CI buildings. This shall include the revision and creation of approximately 10-15 materials such as factsheets, frequently asked questions, case studies, talking points, web content, presentation slides, key messages, e-mails to partners, program announcements, and press releases among other pieces during the period of performance. When applicable, final materials shall be delivered in print ready format and a format ready to be coded for placement on the WaterSense website. The Contractor shall use the materials developed in this task to assist the WaterSense program in conducting outreach to CI buildings via emails, trade articles, webinars, or press releases. In addition, the Contractor shall assist EPA in incorporating WaterSense information into materials for ENERGY STAR Commercial and Institutional building partners. For purposes of estimation, 20-25 outreach activities are expected during this period of performance.

*Task 7.2 CI Tools and Information Collection* – The Contractor shall provide support to the WaterSense team in collecting tools and information from established CI programs and other relevant stakeholders across the country. The support shall be limited to compiling the information submitted to the WaterSense Program and compiled under the previous WAs 0-08, 1-08, and WA



2-05 through 5-05 into a useable format to be placed on the WaterSense website. Most of the information used in this effort has already been received, so minimal research will be required. The Contractor shall suggest an appropriate format in an outline or web page schematic based on the information received. Once the formatting is approved, the Contractor shall create the web pages. The web pages will be posted under the Web Support WA B-04, not this one. A written summary report will not be required for this task.

**Task 7.3 Commercial Water Assessment and Evaluation Tool** – The Contractor began developing an excel-based tool under WA 4-05 and 5-05 to assist facility managers, owners and other stakeholders in tracking their water use and calculating their potential savings and payback. The first version released under WA 5-05 was specifically focused on hotel and hospitality facilities. Under this WA, the contractor shall assist EPA in expanding this tool to apply to the broader CI facility audience and complete any revisions or updates to this tool including testing and finalizing the content by the end of the period of performance.

### **Task 8 – Commercial and Institutional Technical Support**

The WaterSense Program will provide technical support to the CI sector on water efficiency and management. For this task, the Task Manager is Jonah Schein, a member of the WaterSense team. A task manager will be the primary technical contact for the specified task and participate in technical communication with the contractor. However, any technical direction will still come from the EPA WACOR. At the conclusion of the performance period, the contractor shall prepare a final annotated version of any documents or tools for delivery to the WACOR. The annotated version shall include any information necessary to continue use of the materials after the contract has ended including but not limited to citation of data sources and an explanation of calculations and terms. The Contractor shall support this portion of the program by completing the following tasks:

*Task 8.1 Product Deployment Strategy and Implementation* – WaterSense develops strategies and methods to deploy each of its labeled product categories. To help ensure the successful launch of WaterSense's commercial products, the Contractor shall develop a short strategy to most effectively deploy CI products. For purposes of estimation, the contractor shall expect to develop 2-3 strategies of approximately five (5) pages. The strategy shall include target decision-makers and audiences in the commercial product procurement chain, The Energy Star programs CI efforts and relevant trade publications, and other market factors that would affect the launch of these WaterSense labeled products. After the approval of the strategy, the contractor shall implement the strategy as directed by the WACOR. In addition, the contractor shall continue to implement the deployment strategy for flushing urinals that was developed and approved under the previous WAs 0-08, 1-08, 2-05 and 3-05.

*Task 8.2 Program Materials* – The Contractor shall develop program materials specific to water efficiency and commercial products similar in format to materials created for the launch of WaterSense labeled toilets and faucets under EP-C-09-008. Much of the content for these materials has already been developed in other WaterSense materials and the product market research reports. Materials are expected to include factsheets, frequently asked questions, talking points, presentation slides, key messages, emails to partners, program announcements, and press releases among other pieces. Approximately 10-15 pieces are estimated to be developed during the period of performance. When applicable, final materials shall be delivered in print ready format and a format ready to be coded for placement on the WaterSense website.

*Task 8.3 ENERGY STAR Portfolio Manager Revisions* – The ENERGY STAR program is currently revising, expanding, and enhancing their Portfolio Manager tool used by all types of buildings. The Contractor shall continue to assist the WaterSense team in recommending changes and additions to the Portfolio Manager specific to WaterSense and water efficiency in CI buildings. As directed by the WACOR, the Contractor shall develop a list of recommended changes to be submitted to ENERGY STAR. The Contractor shall also provide technical support to the WaterSense team as the changes are implemented by answering questions and providing clarifications when needed within one (1) week of receipt from WACOR.

*Task 8.4 Development of a Water Efficiency Benchmark Pilot Program* –The objective of this task is to evaluate the feasibility of developing a water efficiency benchmark for water efficiency in multi-family, commercial and institutional buildings. The benchmark would be compatible with the Energy Star energy efficiency benchmark and based on data from its Portfolio Manager program. The evaluation would consider whether data being collected from the Energy Information Administration, Fannie Mae or other sources would be useful, from the 2007 Commercial Buildings Energy Consumption Survey provided under EP-C-09-008 WA 3-05 or the Fannie Mae survey of Multifamily buildings provided under WA 5-05.

*Task 8.5 CI Best Management Practice Webinars* – The contractor shall develop additional webinars in a series based on the content developed in the *WaterSense at Work: Best Management Practices for Commercial and Institutional Facilities* created under contract EP-C-09-008 WA 5-05. The contractor shall create and outline, draft presentation, and final presentation for each webinar that will include content for a specific section of the BMPs and a case study from a facility that has completed water efficiency projects in those sections. Each webinar will be approximately 1.5-2 hours in length. The contractor shall complete all logistics for the webinar including registration, presentation development, and delivery, recording and editing. The final deliverables shall be a 508-compliant, multi-media file in a format determined by the WACOR that can be placed on the WaterSense public website for

stakeholders to listen to in the future. The development of approximately 7-9 webinars will be required during the work assignment period of performance.

#### **IV. DELIVERABLE SCHEDULE (by tasks/subtask and due date)**

The deliverables for this task are highly dependent on the progress and coordination of work with outside stakeholders. All activities shall begin based on WACOR direction unless otherwise noted. Due dates for draft documents are identified in the tables below. The contractor shall discuss any disagreements with or questions on EPA-provided comments prior to submission of a final document. All deliverable revisions will be due back to the EPA WACOR no later than 15 business days after the contractor receives EPA feedback unless otherwise specified by the WACOR. If EPA chooses not to provide comments, the draft document will be accepted as final, and the contractor will be notified that no revisions are required.

Documents prepared under this contract shall be provided in electronic format, compatible with the MS Office Suite. All documents shall be provided first as drafts. EPA may provide comments for the contractor to incorporate into the final documents. The final document format will be agreed upon by the EPA WACOR and the contractor in advance. The contractor shall also provide electronic copies of any data files developed in the course of this Work Assignment.

#### **Task 1 – Work Plan, Funds Tracking and Work Assignment Management<sup>3</sup>**

<b><i>Subtask</i></b>	<b><i>Deliverable</i></b>	<b><i>Due Date</i></b>
1.1	Work Plan and PQAPP	15 calendar days after the contractor receives the work assignment.
1.2	Funds Tracking and WA Management	Monthly
1.3	Program Planning	Meetings within one (1) week of WACOR direction Final plan December 15, 2014

#### **Task 2 - Product and Service Research**

<b><i>Subtask</i></b>	<b><i>Deliverable</i></b>	<b><i>Due Date</i></b>
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<sup>3</sup> This WA contains number of activities based on our research and work with other committees. Since we have little to no control over the committee schedules deadlines are set based on information at the time and realistic. This flexibility has worked extremely well for both the contractor and the WACOR under EP-C-09-008.

2.1	Product Screening Tool	Within 20 business days of WACOR direction
2.2	Technical Assessment and Market Research	Within 60 business days of WACOR direction

### **Task 3 - Product Development and Management**

<b><i>Subtask</i></b>	<b><i>Deliverable</i></b>	<b><i>Due Date</i></b>
3.1	Notice of Intent	Within 30 business days of WACOR direction
3.2	Draft Specification material	Within 60 business days of WACOR direction
3.3	Final Specification material	Within 60 business days of WACOR direction
3.4	Technology Guide	Within 45 business days of WACOR direction
3.5	Specification Updates	Within 30 business days of WACOR direction
3.6	Standards Development Committees	Ongoing

### **Task 4 – Product Certification**

<b><i>Subtask</i></b>	<b><i>Deliverable</i></b>	<b><i>Due Date</i></b>
4.1	Certification document management	Within twenty (20) business days of WACOR direction
4.2	Certification Audit	First audit report – August 30 2014 Second Audit – January 15, 2015

### **Task 5 – Technical Product Support**

<b><i>Subtask</i></b>	<b><i>Deliverable</i></b>	<b><i>Due Date</i></b>
5.1	Green building program support	As directed by the WACOR
5.2	Marketing and outreach	As directed by the WACOR

5.3	Miscellaneous technical support	As directed by the WACOR
5.4	Energy Star program coordination	As directed by the WACOR
5.5	Life-cycle analysis	Within four (4) weeks of WACOR direction
5.6	Factoid Catalog updates	As directed by WACOR

#### **Task 6 – New Homes**

<b><i>Subtask</i></b>	<b><i>Deliverable</i></b>	<b><i>Due Date</i></b>
6.1	Specification Management	As directed by the WACOR
6.2	New homes certification system management	As directed by the WACOR
6.3	Builder resource manual and training	Within 60 business days of WACOR direction or as agreed to as reasonable by contractor and WACOR

#### **Task 7 – Commercial and Institutional Sector Outreach**

<b><i>Subtask</i></b>	<b><i>Deliverable</i></b>	<b><i>Due Date</i></b>
7.1	General CI materials	Within three (3) weeks of WACOR direction
7.2	CI Tools	Within three (3) weeks of WACOR direction
7.3	Assessment and Evaluation Tool	Within five (5) weeks of WACOR direction

#### **Task 8 – Commercial Product Support**

<b><i>Subtask</i></b>	<b><i>Deliverable</i></b>	<b><i>Due Date</i></b>
8.1	Product deployment strategy	Within three (3) weeks of WACOR direction
8.2	Program materials	Within three (3) weeks of WACOR direction

8.3	Energy Star Portfolio Manager revision	As directed by the WACOR
8.4	Evaluation of benchmark	As directed by the WACOR
8.5	Outline of Content for Webinar	Within three (3) weeks of WACOR direction
	Draft Presentation	
	Final presentation	Within four (4) weeks of WACOR direction
	Recorded presentation files	Within two (2) weeks of WACOR direction
		Within four (4) weeks of Webinar

## **V. MISCELLANEOUS**

### **A. Software Applications and Accessibility**

Files delivered to the Government shall be Microsoft Office 2013 or higher. All software and electronic information technology shall conform to the requirements relating to accessibility as detailed to the 1998 amendments to the Rehabilitation Act, particularly, but not limited to, § 1194.21 Software applications and operating systems and § 1194.22 Web-based intranet and internet information and applications. See: <http://www.section508.gov>.

- Preferred text format: MS Word,
- Preferred presentation format: Power Point
- Preferred graphics format: Each graphic is an individual JPEG or GIF file
- Preferred portable format: Adobe Acrobat, Version X
- Preferred tracking format: MS project or excel

**B. Travel.** Travel is expected for this work assignment. Any travel chargeable to this work assignment shall be allowable only in accordance with the limitation of FAR 31.205-43 and FAR 31.205-46, and must be approved by the EPA Contracting Officer Representative (COR) prior to travel taking place. . The WACOR will provide at least a two week notice of any non-local travel. For planning purposes, the contractor shall assume 4-6; 2-3 day trips will be required over the course of this Work Assignment as described in Task 3 and 5 above.. . One to two contractors shall attend each conference under this work assignment (though other WACORs may request additional support under their own work assignments).

### **C. Release of Data and Information.**

All information collected and developed under this Agreement is the property of the U.S. EPA and shall not be released to the public or used for other work or projects, including EPA or other federal work, without written authorization of the Contracting Officer. Information from this task shall be included in the program

database (Salesforce), as appropriate. Updates to the database shall include communications with Stakeholders such as e-mails and meeting summaries.

#### **D. Conference/Meeting Guidelines and Limitations:**

All appropriate clearances and approvals required by Agency policy in support of any and all conference related activities and expenses, including support of meetings, conferences, training events, award ceremonies and receptions, including the form 5170 for all meetings costing more than \$20,000, shall be obtained by the EPA Contract Level COR as needed and provided to the Contracting Officer (CO). Work under conference related activities and expenses shall not occur until this approval is obtained and provided by the EPA Contract Level COR. Conference expenses are all direct and indirect costs paid by the government and include any associated authorized travel and per diem expenses, room charges for official business, audiovisual use, light refreshments, registration fees, ground transportation and other expenses as defined by the Federal Travel Regulations. All outlays for conference preparation should be included, but the federal employee time for conference preparation should not be included. After notifying EPA of the potential to reach this threshold, the Contractor shall not proceed with the task(s) until authorized to do so by the Contracting Officer.

#### **E. Contractor identification**

Contractor personnel shall always identify themselves as Contractor employees by name and organization and physically display that information through an identification badge. Contractor personnel are prohibited from acting as the Agency's official representative.

The Contractor shall refer any questions relating to the interpretation of EPA policy, guidance, or regulation to the Work Assignment Contracting Officer Representative.

#### **F. Technical Direction**

The Contract level COR or an authorized individual is permitted to provide technical direction. Technical direction must be within the statement of work of the contract and includes: (1) Direction to the contractor which assists the contractor in accomplishing the Statement of Work, (2) Comments on and approval of reports or other deliverables. Technical direction will be issued in writing or confirmed in writing within five (5) calendar days after verbal issuance. One copy of the technical direction memorandum will be forwarded to the Contracting Officer and the Contract Level Contracting Officer Representative.

#### **G. Management Controls**

All printing shall be in accordance with clause H.2 (Printing) of the contract.

## **VI. QUALITY ASSURANCE SURVEILLANCE PLAN**

All tasks are to be completed on or ahead of schedule unless EPA and the contractor mutually agree to a schedule change.

The contract level QASP applies to this work assignment. The requirements do include environmental measurements, etc., therefore a supplement programmatic quality assurance project plan (PQAPP) is required.